



New Presidents Intensive 2025

Session 1 | In Person Day 1

June 23, 2025

Your Host for the New Presidents Intensive

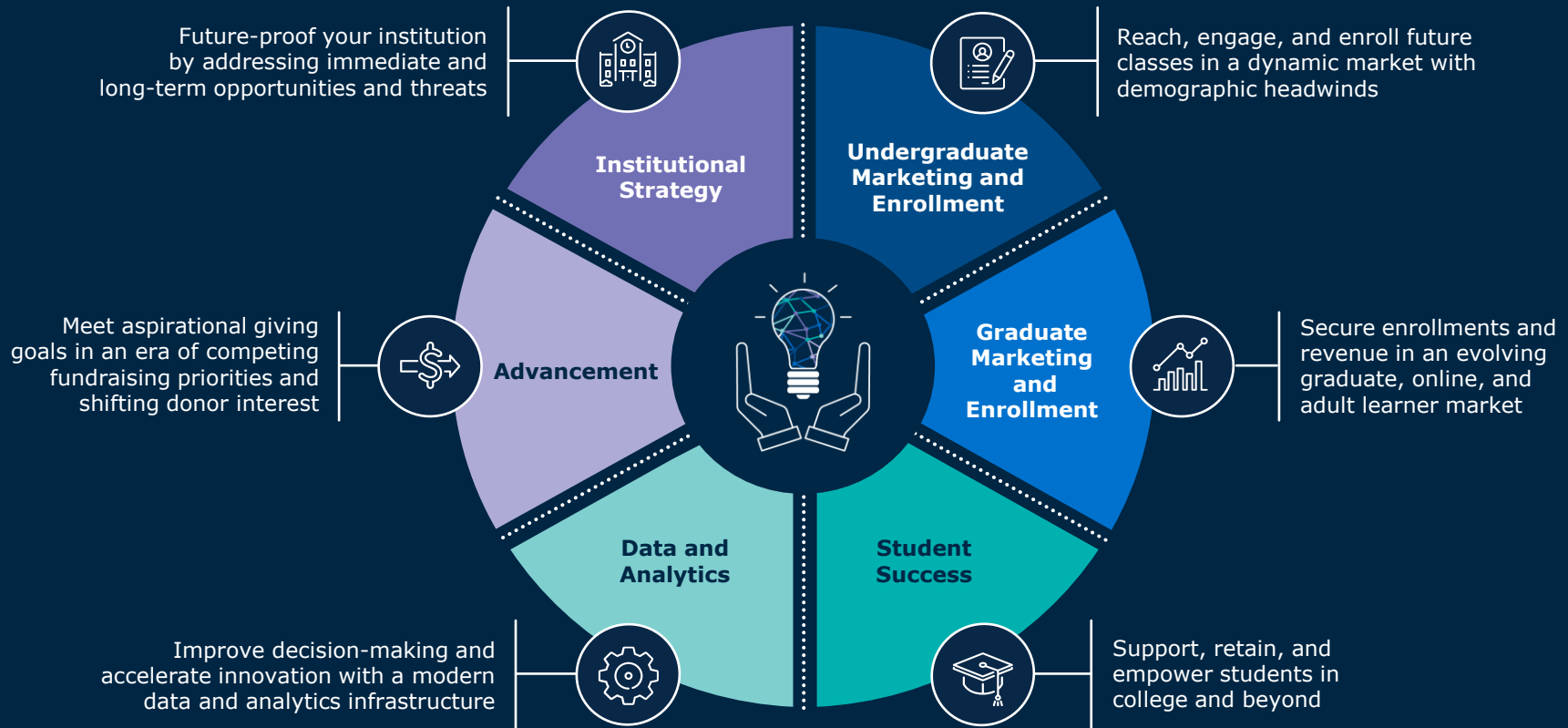


Sally Amoruso

Chief Partner Officer

SAmoruso@eab.com



Insight-powered Solutions for Your Top Priorities and Toughest Challenges

We partner with **2,800+** institutions to accelerate progress, deliver results, and enable lasting change.

95%+ of our partners return to us year after year because of results we achieve, together.

Your Facilitators

Blue Cohort



Susan Woda

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Green Cohort



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Orange Cohort



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Purple Cohort

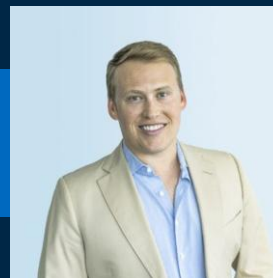


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Red Cohort



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Guest Speakers & EAB Presenters



Dr. Gordon Gee
West Virginia University
(President -Emeritus -
Ohio State University,
Vanderbilt University,
Brown University,
University of Colorado)



Dr. Chris Howard
COO & EVP, Arizona
State University
(President-Emeritus –
Robert Morris University,
Hampden-Sydney
University)



Dr. Rachelle Keck
Grand View University
(President-Emerita,
Briar Cliff University)



Dr. Meredith Woo
Professor, Arizona
State University
(President-Emerita –
Sweet Briar College)



Dr. David Attis
*Managing Director,
Research Advisory
Services*



Ben Court
*Senior Director,
Research Growth
Strategy*



Colin Koproske
*Managing Director,
Research Discovery &
Design*



Mark Shreve
*Managing Director,
Partner Development*



Dr. David Vuletich
*Managing Director,
Research Advisory
Services*

Agenda | Day 1



12:00 p.m.

Lunch & Introductions

12:30 p.m.

Reckoning with Relevance

Unpacking the Crisis of Public Confidence in Higher Ed with a Spotlight on Federal Policy
Sally Amoruso & Ben Court

2:00 p.m.

Dynamic Strategy

Embedding Rigor, Agility, and Accountability into Institutional Strategy
Colin Koproske



Dr. Meredith Woo

Professor, Arizona State
University
(President-Emerita – Sweet
Briar College)

3:00 p.m.

Differentiating the Student Value Proposition

Mapping Institutional Strengths to Student Benefits
Colin Koproske

4:30 p.m.

Institutional Self-Assessment

Assessing Strengths, Gaps, and Presidential Priorities
Sally Amoruso

6:00 p.m.

Networking Dinner at Fiola Mare

Agenda | Day 2



8:00 a.m.

Breakfast Discussion for Research University Presidents

Dr. David Attis

9:00 a.m.

Implications of AI for Higher Ed and the Future of Work

Key Opportunities for University Leadership

Dr. David Attis

10:30 a.m.

Special Presidential Panel

Lessons in Bold Leadership



Dr. Gordon Gee

West Virginia University
(President-Emeritus - Ohio State University, Vanderbilt University, Brown University, University of Colorado)



Dr. Chris Howard

COO and EVP,
Arizona State University
(President-Emeritus - Robert Morris University, Hampden-Sydney University)



Dr. Rachelle Keck

Grand View University
(President-Emerita, Briar Cliff University)

12:00 p.m.

(Working Lunch) The President as Fundraiser-In-Chief

Emerging Trends and Best Practices in Advancement

Mark Shreve & Dr. David Vuletich

1:15 p.m.

Shared Governance 2.0

Building Trust and Campuswide Engagement Around Critical Decisions

Colin Koproske

3:00 p.m.

Adjournment



Letter from the NPI Class of '24

- Dr. Lisa Coleman | Adler University
- Jon Parrish Peede | Ashland University
- Dr. Steve Elliott | Black Hills State University
- Dr. Morakinyo Kuti | Central State University
- Dr. Manya Whitaker | Colorado College
- Jerry Tarrer | Columbia College Chicago
- Dr. Jeremy Martin | Florida Southern College
- Dr. Joel Shrock | Graceland University
- Dr. Michelle Schutt | Greenfield Community College
- Susan Kazama | Hawaii Community College
- Dr. George Timmons | Holyoke Community College
- Erik Coyne | Ivy Tech Community College-Bloomington
- Dr. Rachel Kartz | Ivy Tech Community College-Hamilton County Campus
- Dr. Christina Clark | La Roche University
- Dr. Ruth Ray Jackson | Langston University
- Dr. Matt Seimears | Lower Columbia College
- Frank Neville | Millsaps College
- Dr. Mahyar Amouzegar | New Mexico Institute of Mining and Technology
- John Broadmeadow | Norwich University
- Dr. Lori Stewart Gonzalez | Ohio University
- Dr. Jon Anderson | Pennsylvania Western University
- Dr. Kristen Miller | Southern Maine Community College
- Dr. Peter Nwosu | SUNY Oswego
- Dr. Emily Messer | Texas Wesleyan University
- Dr. Justin Schwartz | University of Colorado at Boulder
- Dr. Jennifer Sobanet | University of Colorado Colorado Springs
- Dr. Kathy Johnson | University of New Orleans
- Dr. Teresa Dahlberg | University of Tampa
- Dr. Safiya George | University of the Virgin Islands
- Dr. Lynn Akey | University of Wisconsin-Parkside

Learning About Our Colleagues....





EAB

Reckoning With Relevance

2025 State of the Sector

Five Priorities Shaping Higher Ed Strategy

1

Public Perception of Higher Ed Value

2

Enrollment and Demographics

3

Sustainable Business Models

4

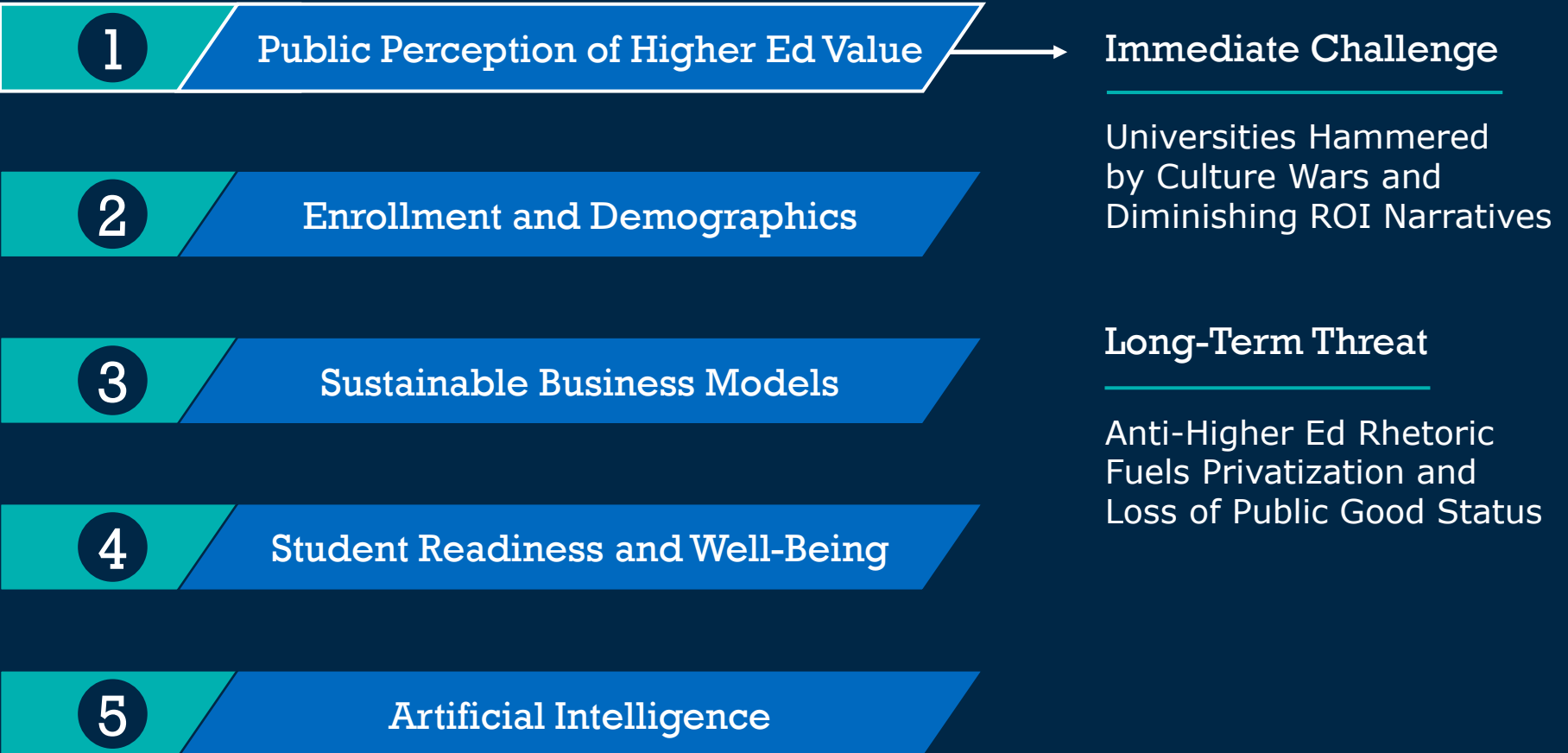
Student Readiness and Well-Being

5

Artificial Intelligence



Five Priorities Shaping Higher Ed Strategy



Immediate Challenge

Universities Hammered
by Culture Wars and
Diminishing ROI Narratives

Long-Term Threat

Anti-Higher Ed Rhetoric
Fuels Privatization and
Loss of Public Good Status



Higher Ed Value Increasingly Called Into Question

Headlines Fuel Growing ROI Concerns



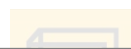
**"Doubts About Value Are
Deterring College Enrollment"**

THE
CHRONICLE
OF HIGHER
EDUCATION

"College for All? Not Anymore."



**"3 Ways Higher Education Can
Flip the Script"**



The real reasons why
"alarming" numbers of
Americans are rejecting college"

Newsweek

**"Is College Still Worth It?
Many Americans Say No"**



"College is still
finds – although students are
growing skeptical"

Washington
Examiner

than half of Americans
college degrees are
waste of money"



**"The Alarming Truth About
High Schoolers' College
Outlook: Confusion, Doubt,
and a Surprising Indifference"**



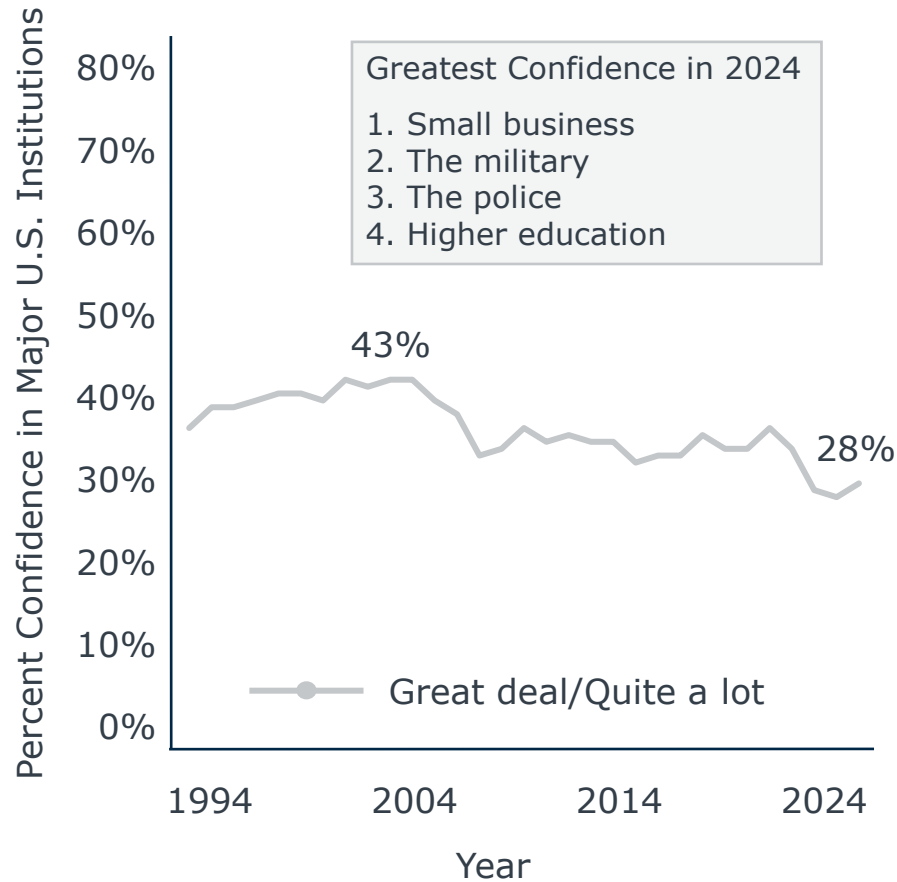
HIGHER ED DIVE

**"Half of Graduates End Up
Underemployed – What Does
That Mean for Colleges?"**

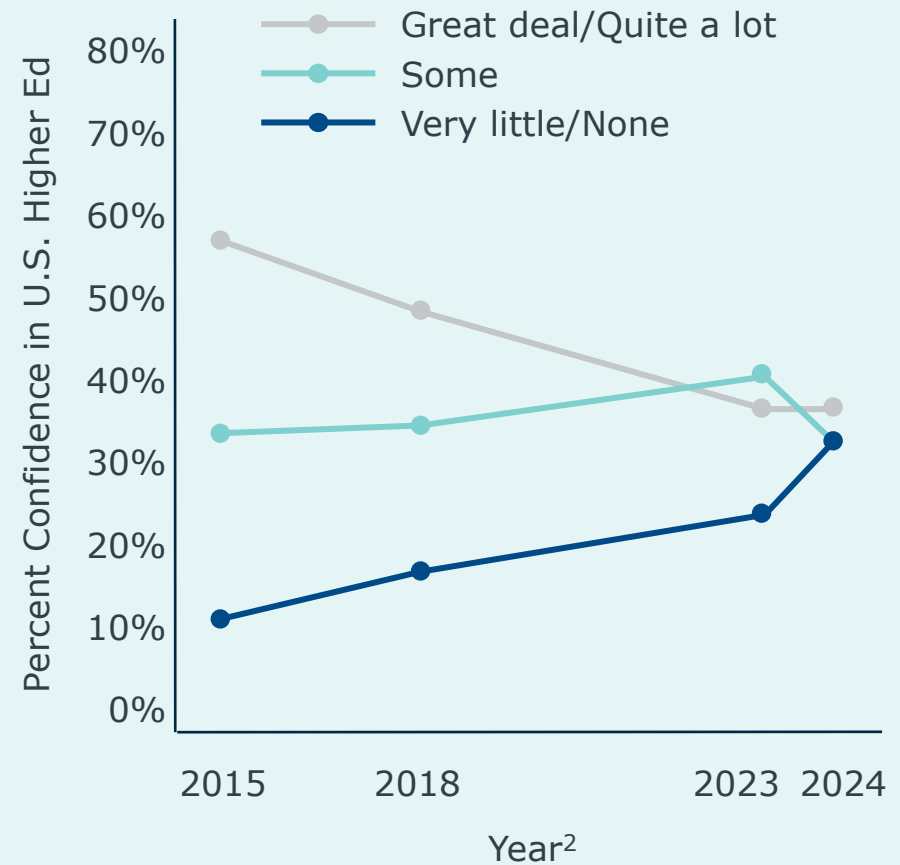
Source: Bermejo, Raquel, "[The Alarming Truth About High Schoolers' College Outlook: Confusion, Doubt, and a Surprising Indifference](#)," *Ruffalo Noel Levitz*, September 27, 2024; Blake, Jessica, "[Doubts About Value Are Deterring College Enrollment](#)," *Inside Higher Ed*, March 13, 2024; Burke, Lilah, "[Half of graduates end up underemployed – what does that mean for colleges?](#)", *Higher Ed Dive*, March 25, 2024; Kelderman, Eric, "[College for All? Not Anymore.](#)", *The Chronicle of Higher Education*, September 4, 2024; Rahman, Khaleda, "[Is College Still Worth It? Many Americans Say No](#)," *Newsweek*, September 1, 2024; EAB interviews and analysis.

The Story Behind the Story

Overall Confidence in U.S. Institutions¹ Has Fallen Over the Last 30 Years



Declining Confidence in U.S. Higher Education Over the Last Decade



1) Includes the 14 institutions rated consistently by Gallup since 1993.

2) Gallup survey data is only available for 2015, 2018, 2023, and 2024.

Trend #1: Traditional defenses of higher ed are trapped in an echo chamber

For every 100 Americans...

...87 graduate from high school



87% of U.S. public high school students graduate on time

For every 100 Americans...

...39 enroll at 4-year institutions



45% of high school graduates enroll at 4-year institutions

For every 100 Americans...

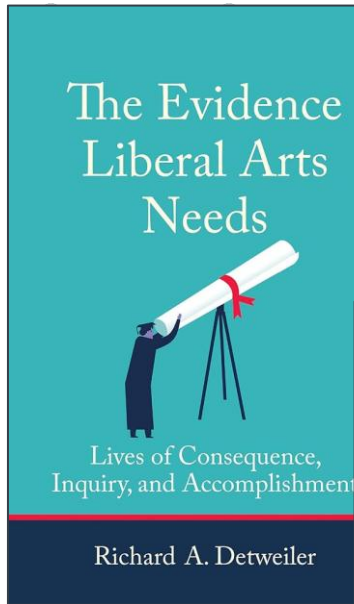
...24 complete college in 6 years



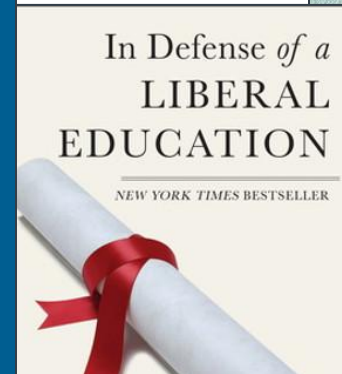
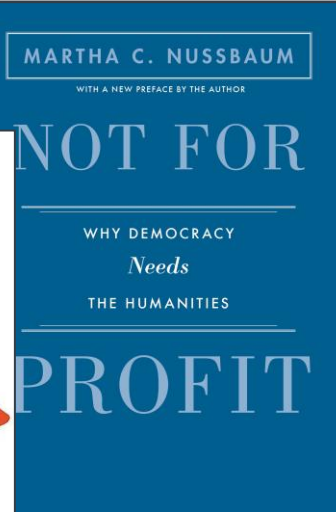
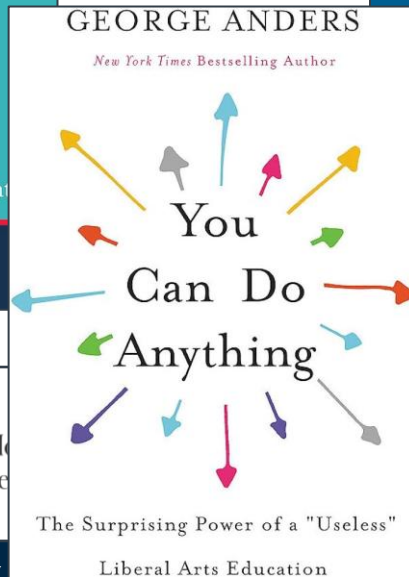
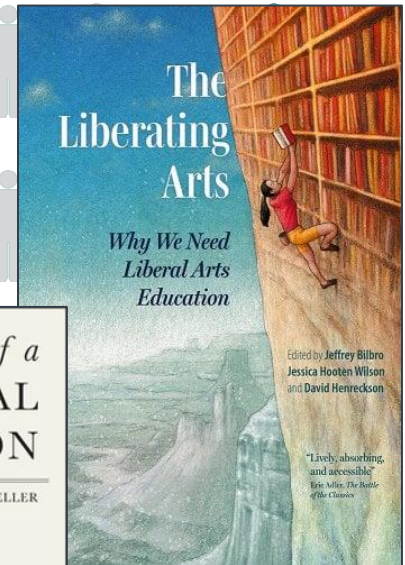
61% of 4-year college enrollees graduate within six years

For every 100 Americans...

...12 have a good job after college¹



The Washington Post
Some see liberal arts education as elitist. Why it's really pragmatic.



Forbes
Why The Humanities Matter More Than Ever—Even When You Keep Hearing Otherwise

The New York Times
Higher Education Needs More Socrates and Plato
May 19, 2024

48% of college grads have a good job on [redacted] ing

1) The majority of workers in that occupation have or are required to have a bachelor's degree. Measured one year after graduation.

For every 100 Americans...

...3 liberal arts¹ grads have a **good job** after college

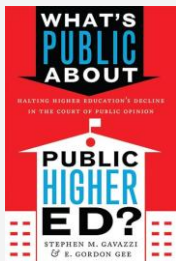


28% of bachelor's degree conferrals are in the liberal arts

1) Includes ten IPEDS CIP Codes (05, 09, 16, 23, 24, 38, 42, 45, 50, 54).

An Echo Chamber Problem

Our Messages Mostly Reach the Small Group We've Already Convinced...



Overall Best Sellers Rank:
#403,974

Customer Reviews:
★★★★★ **2 ratings**



Jeff Selingo,
Michael Horn

Listen Score:
42/100

Instagram Followers:
591



Daily News Subscribers:
250,000

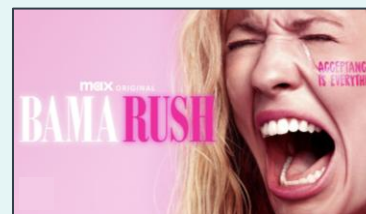
Readers with Master's:
83%

...While the Broader Public Is Often Exposed to Less Flattering Portrayals



YouTube Views:
438K

Nightly Viewership:
~7M



TikTok Views:
3.4B

Reviews:
4.2/10 (**2.1K+ ratings**)



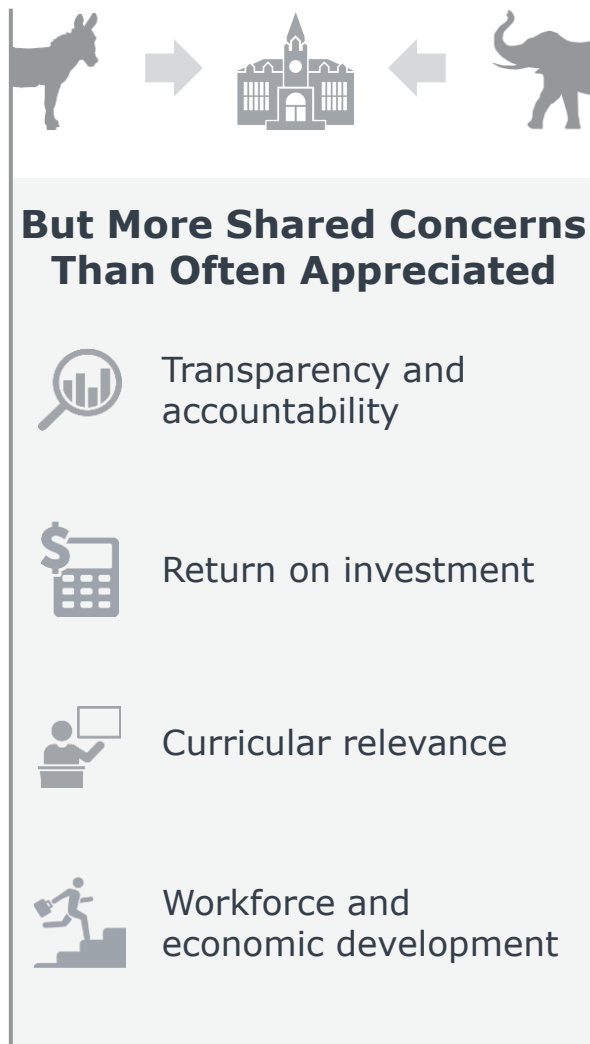
Netflix Views:
2.6M (since 2023)

Rotten Tomatoes:
88%

Attacks Coming From Both Sides of the Aisle

Political Left Critiques Higher Ed on Its **Value**

- **Rising costs** and hidden fees block access, especially for underrepresented groups
- Lack of accountability for student and **post-graduation outcomes**
- **Low-quality** programs fuel debt crisis and fail to lead to good jobs
- Inadequate support systems hinder **student success**



Political Right Critiques Higher Ed on Its **Values**

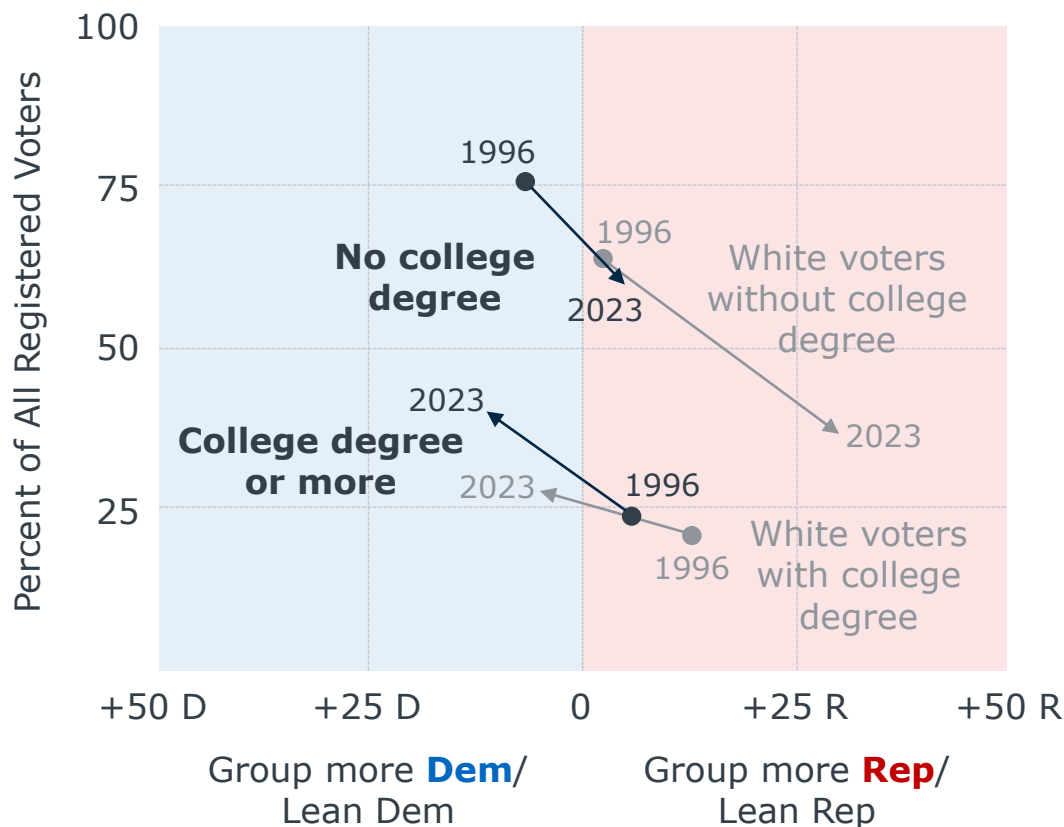
- “Woke” curriculum and faculty suppress **free speech** along with viewpoint diversity
- Discriminatory admissions policies gatekeep access and hinder **meritocracy**
- Inefficient resource use shifts costs onto taxpayers instead of promoting **personal and fiscal responsibility**
- Foreign interference threatens **democracy** and **national security**

Education Level Closely Linked to Political Affiliation

22

College Grads Make Up A Growing Share of Voters and Have Moved More Democratic, While Those Without a Degree Have Shifted to GOP

Change in partisan affiliation and share of registered voters with and without a college degree, 1996 to 2023 (Pew Research Center)



60%

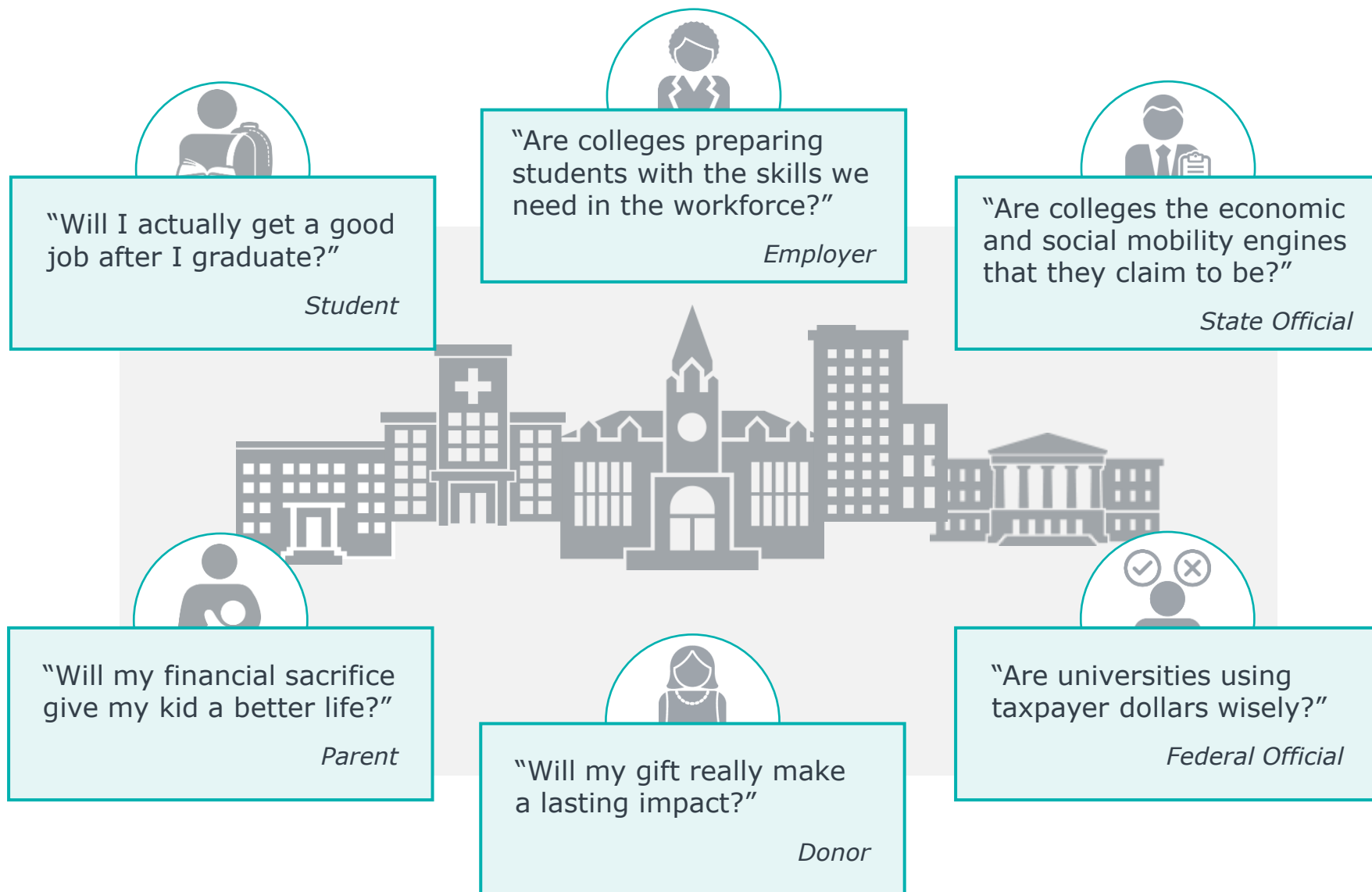
Of registered voters do not have a college degree

13%







Advantage that the Republican Party holds among voters without a college degree

Stakeholders Pushing Harder Than Ever on Outcomes

23



What's Changed for Higher Education?

 <h2>Immigration</h2> <ul style="list-style-type: none"> • Immigration agents can attempt operations in sensitive areas • Local police can be deputized to act as immigration officers • Undocumented immigrants can be placed in federal detention if accused of theft and other crimes • Undocumented immigrants can be deported without a hearing if they are not able to produce 2+ years of continuous presence 	 <h2>Title IX & Gender Recognition</h2> <ul style="list-style-type: none"> • The federal government now only recognizes two sexes (M/F) based on assignment at birth • Title IX protections reverted to 2020 language (which removes transgender protections and expands protections for those accused of sexual assault) • The NCAA restricted participation in women's competitions to those assigned female at birth 	 <h2>Research Funding</h2> <ul style="list-style-type: none"> • NIH sets cap on "F&A" at 15% for all existing and new research grants • NIH/NSF grant review processes are "getting back on track" after the federal funding freeze • Federal agencies have been directed to cut DEI-related grants "to the maximum amount allowed by law" • \$900M in Education Dept contracts canceled, essentially shuttering the statistics arm (NCES)
 <h2>International Enrollment</h2> <ul style="list-style-type: none"> • Enhanced screening and vetting will apply to all visa applicants • Agencies directed to identify nations with "deficient" screening practices for future travel bans • Student visa holders may be deported for engaging in activism • Institutions are encouraged to monitor and report behaviors that meet "grounds for inadmissibility" 	 <h2>DEI Policies & Initiatives</h2> <ul style="list-style-type: none"> • Any institution engaged in "illegal DEI" (now defined as any race-conscious action) is now subject to Title VI violations • Education Dept initiatives and programs related to diversity, equity, and inclusion have been shuttered (including staff reductions and removal of resources) • Failure to comply with Title VI directives could result in loss of federal funding 	 <h2>Funding & Student Aid</h2> <ul style="list-style-type: none"> • The House Budget Resolution suggests \$330B in cuts to education funding; student aid programs at-risk to be defunded through reconciliation • Linda McMahon confirmed intent to move Education Dept functions to other federal agencies (e.g., student loans to the Small Business Administration) • Reduction in Education Dept staff could result in FAFSA delays

EAB's New Federal Policy Navigation Suite

Four Resources to Support the Right Conversations at the Right Time

Policy Proposal Primers

- Quickly educate stakeholders on proposals and implications
- Define key questions to guide cabinet and board discussions

Implementation Probability Index

- Monitor which changes are likely to occur within the next six months
- Help to alleviate anxiety around implausible actions



Peer Position Pulse Checks

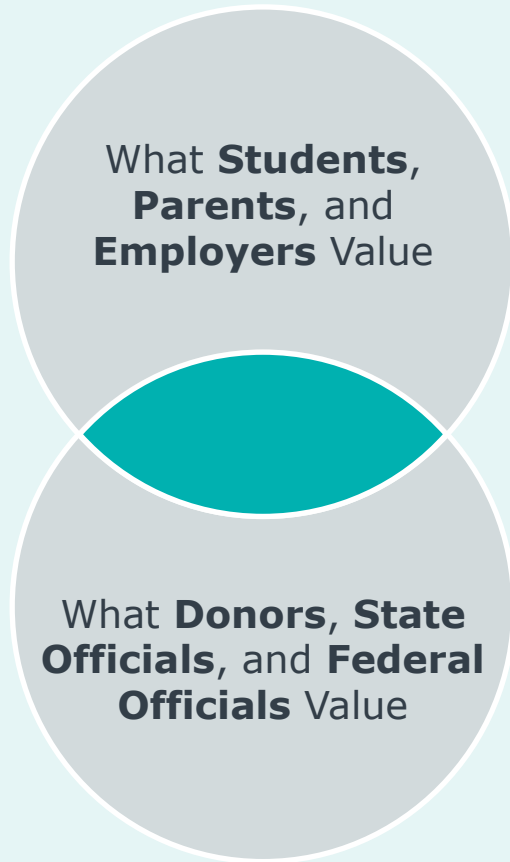
- Monitor positions and intentions of peer institutions
- Inform strategic decisions about where to align or differentiate

Scenario Planning Exercises

- Prepare strategic options for disruptive scenarios
- Identify easily overlooked strategic opportunities

Access EAB's full Federal Policy Navigate Suite [here](#).

No Shortage of Shared Priorities



A Surprisingly Fertile Common Ground

- Provable ROI and impact
- Workforce alignment and development
- Economic growth and social mobility
- Post-graduation outcomes and salaries
- Relevant credentials and curricula
- Career exploration and preparation
- Hands-on, experiential learning opportunities
- Practical solutions and technological innovations

...to Outside-In

Focusing on Meeting External Needs Can Result in a Competitive Advantage



Building Trust Requires More Than Just Good PR



Early Affinity-Building and Community Partnerships Are Key Investments

“

Public trust is something to build locally, not nationally.

*President Phillip Sisson
Middlesex Community College*

The eight most dangerous words in higher education are ‘we’ve just got to tell our story better’ because it implies that better comms are more important than actually doing better.

*Alex Usher
Higher Ed Strategy Associates*

”



- Starts building the pipeline in middle school through Future Scholars Program
- Provides local low-income students and families with year-round, wraparound support starting in 7th grade
- 90% of students enroll in college, with 70% at Rutgers
- Future Scholars model has been adopted by eight other universities so far



- Collaboration with local aviation sector has led to new programs, research partnerships, and P3-funded mixed-use buildings
- Requires all students to complete applied learning experience to graduate, directly placing many into paid roles with local industry partners
- 73% of graduates stay in Kansas, which is the highest among public universities

Towards Product Innovation



The Traditional Lines Between “Core” and “Periphery”...



...Are Becoming Increasingly Blurred...



...As Institutions Adapt to the Needs of the Majority



Market-responsive



Cost-conscious



Flexibly-designed



Practitioner-focused



Competency-based



Outcomes-centric

Bad Press and Policy Disruptions Fuel Disengagement³¹

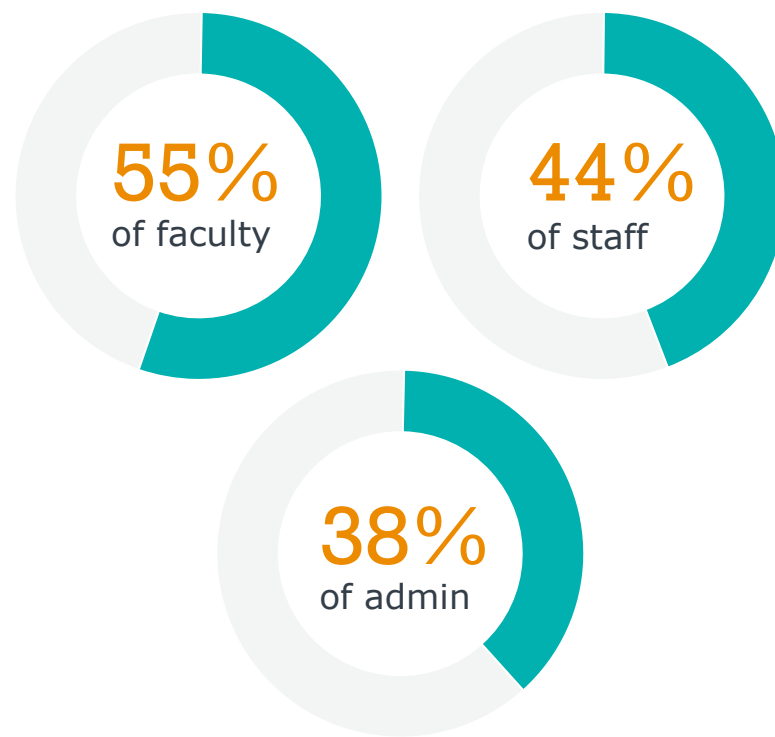


'Crisis of Meaning' Among Faculty and Staff

- Political influence
- Negative media attention
- Increased hostility from students
- Eroding trust between administration, faculty, and staff
- Increasing workloads
- Non-competitive compensation
- Rising student needs
- Inflexible work arrangements
- Caregiving responsibilities

Disaffection for Higher Ed Showing up in Burnout, Low Job Satisfaction

Employees who are less satisfied with their job today compared to five years ago (Chronicle of Higher Education)¹



1)n=4000.

Five Priorities Shaping Higher Ed Strategy

1

Public Perception of Higher Ed Value

2

Enrollment and Demographics



Immediate Challenge

Post-Vaccine Enrollments Stabilize But Still Show Signs of Weakness

3

Sustainable Business Models

4

Student Readiness and Well-Being

Long-Term Threat

The Demographic Cliff “Levels Up” to Peak Population

5

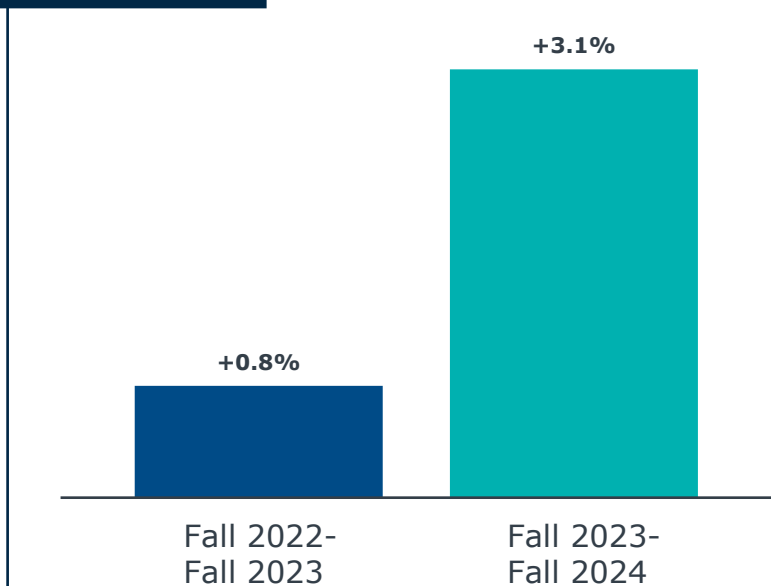
Artificial Intelligence

A Return to Meaningful Growth

Early Indicators Suggest That Freshmen Enrollment and Graduate Enrollment Each Grew 3% From Fall 2023 Levels, Despite FAFSA Challenges

Enrollment Increases at Public and Private Non-Profit Four-Year Institutions, Fall 2022-Fall 2024

Freshmen¹

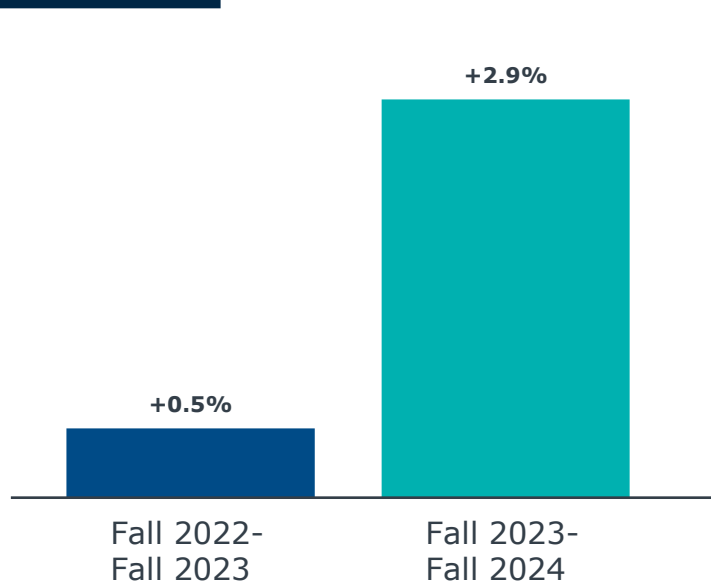


Freshmen¹ Enrollment by Numbers

Fall 2022: **1,359,535**

Fall 2024: **1,413,547**

Graduate²



Graduate² Enrollment by Numbers

Fall 2022: **2,840,935**

Fall 2024: **2,938,340**

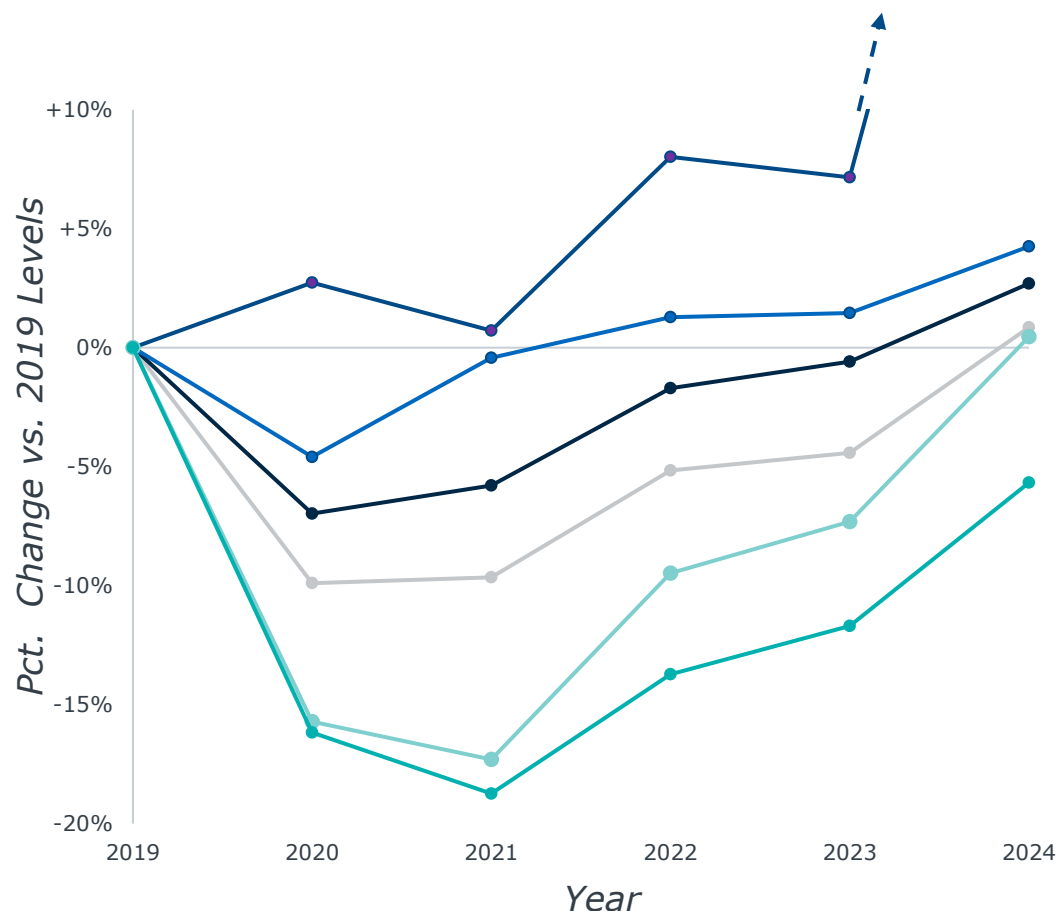
Source: National Student Clearinghouse, *Current Term Enrollment Estimates Fall 2024*, January 23, 2025; EAB interviews and analysis.

1) Freshmen includes full-time and part-time first-time students.
2) Graduate includes masters, professional doctoral (e.g., law, medicine), and PhD. It also includes all graduate students, not just entering students.

We're (Almost) Back to 2019 Enrollment Levels



Percentage Change in First-Time Undergraduate Enrollment Levels¹ Compared to Fall 2019 Levels



Percent Change and Total Change by Segment, Fall 2019-Fall 2024

Private For-Profit 4-Year	+35%	+14K
Private Non-Profit 4-Year	+4.3%	+19K
Public 4-Year	+2.7%	+25K
All Institutions	+0.9%	+21K
Public PAB ²	+0.5%	+1K
Public 2-Year	-5.7%	-47K

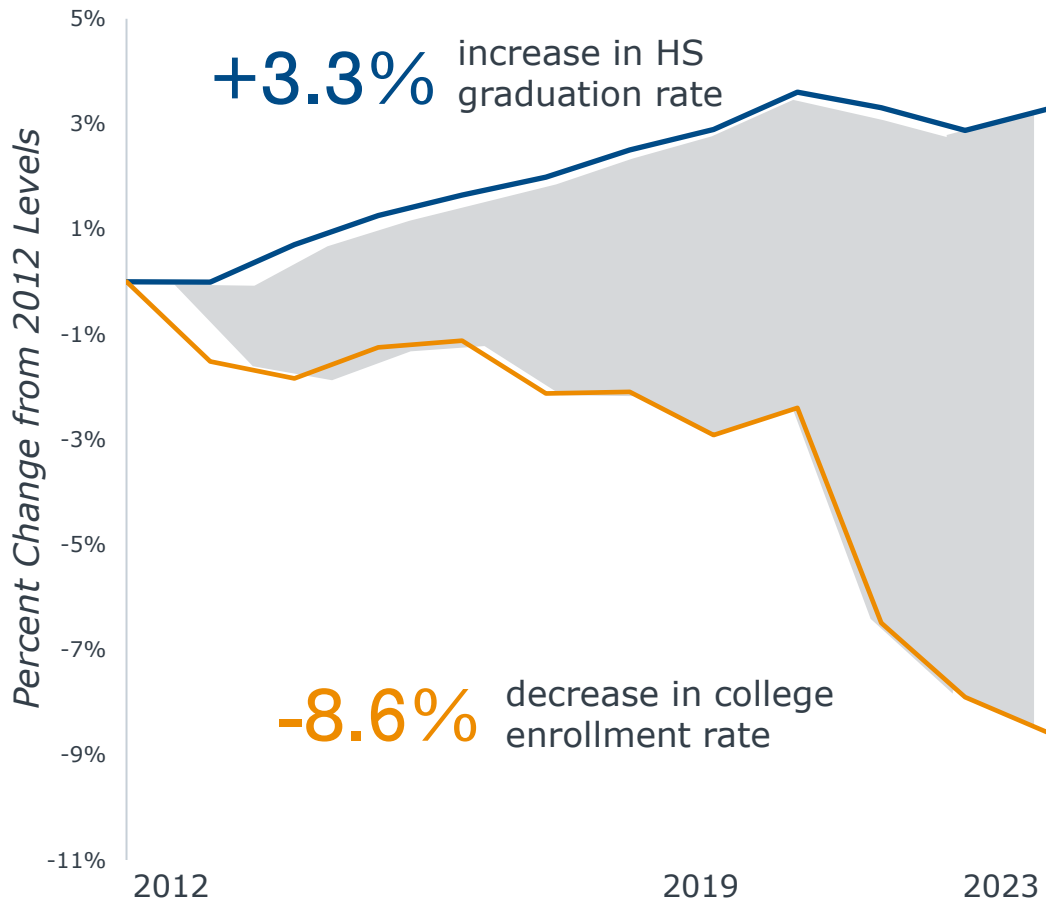
1) Includes all full-time and part-time undergraduate enrollments.

2) Primarily Associate's Granting Baccalaureate Institutions.

“College? No Thanks, I’m Good”

The Non-Consumer Undergraduate Market Is Getting Bigger Every Year

Percent Change in K-12 to College Pipeline, 2012-2023



Decline in College-Going Students Outstripped Decline in HS Grads and Overall Demographics

Change in 19-20-year-olds, 2012-2023¹

-596K decrease in total number of 19-20-year-olds

-276K decrease in number of high school graduates

-708K decrease in number enrolled in college

1) American Community Survey data.

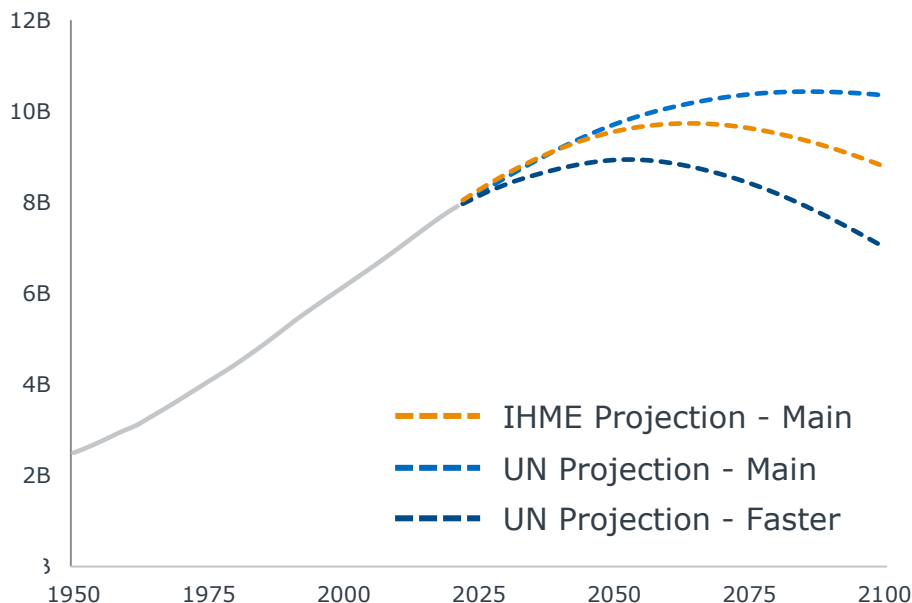
Population Decline Signals Global Transformation



37

World Population Could Peak by 2055

Global Population and Projections Through 2100



“ ”

Most of the world is transitioning into natural population decline. I think it's incredibly hard to think this through and recognize how big a thing it is; **it's extraordinary, we'll have to reorganize societies.**

*Christopher Murray, Director
Institute for Health Metrics and Evaluation*

Specific Countries' Populations Peaking at Different Points



USA

2060

8% decline
by 2100



Canada

2080

3% decline
by 2100



China

2022

49% decline
by 2100



India

2046

32% decline
by 2100



Germany

2035

22% decline
by 2100



Japan

2010

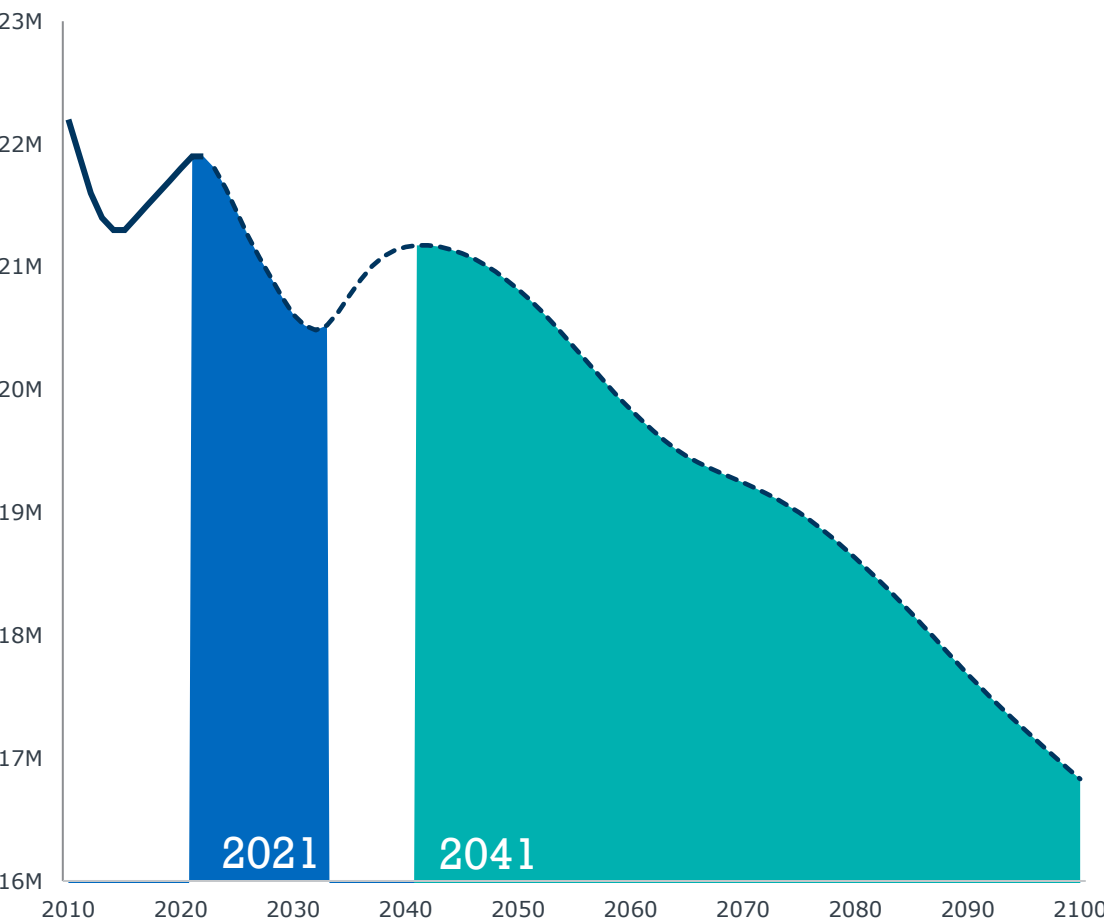
54% decline
by 2100

Source: Institute for Health Metrics and Evaluation, "[Global Fertility, Mortality, Migration, and Population Forecasts 2017-2100](#)," 2020; Department of Economic and Social Affairs Population Division, "[World Population Prospects](#)," United Nations, 2022; [Human Capital Data Explorer](#)," Wittgenstein Centre, 2018; Silver, Huang, "Key facts about China's declining population," Dec. 5, Pew Research Center 2022; EAB interviews and analysis.

Fewer People Means Fewer Enrollments

Demographic Cliff Followed by Even Steeper Decline Through 2100

United States 15- to 19-Year-Old Population, IHME Projection



The Demographic Cliff

-6.3% or -1.4M

Decline in 15- to 19-year-old youth population, 2021-2032

Peak Population

-21% or -4.3M

Decline in 15- to 19-year-old youth population, 2041-2100

3x College-going population decline from 2041-2100 projected to be **~3x the size of pandemic-era enrollment losses**

Five Priorities Shaping Higher Ed Strategy

1

Public Perception of Higher Ed Value

2

Enrollment and Demographics

3

Sustainable Business Models

4

Student Readiness and Well-Being

5

Artificial Intelligence

Immediate Challenge

Rising Budget Pressures
Lead Universities To Pursue
Host of Savings Strategies

Long-Term Threat

A "Less with Less"
Mentality May Be Needed
To Survive Demographic
and Enrollment Changes

A Declining Financial Outlook for the Sector

Moody's



- Overall negative outlook
- Recently downgraded from stable outlook due to federal policy changes

S&P Global



- Overall bifurcated outlook
- Negative outlook for highly regional, less selective schools lacking financial flexibility

Fitch



- Overall deteriorating outlook
- Enrollment issues, tight margins, legislative uncertainty will erode budget flexibility

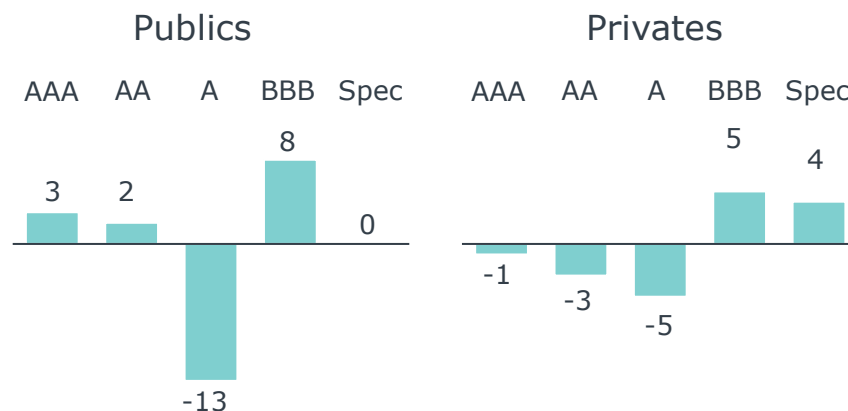
Positive Outlook

- **4%** of ratings have positive outlooks¹
- More positive outlook revisions and upgrades have occurred at higher end of ratings scale

The Growing Credit Quality Divide

Hollowing Out of the Middle

Percentage Point Change, 2015-2024



Negative Outlook

- **12%** of ratings have negative outlooks¹
- **3:1** unfavorable to favorable revisions
- Most downgrades in 2025 will be at lower end of ratings scale

1) As of 11/30/24.



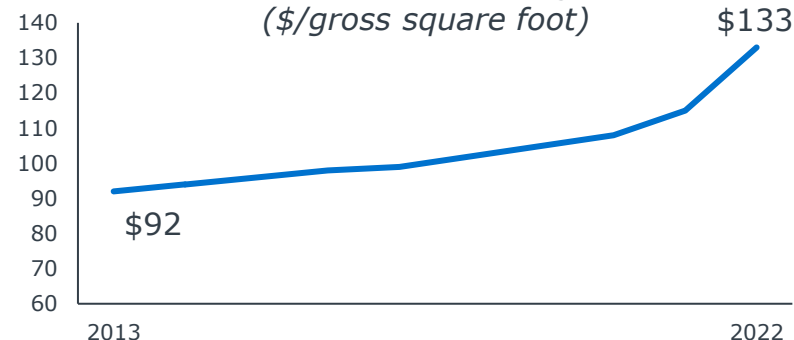
Converging Cost Challenges Squeeze Budgets

Recent Stabilization a Good Sign but Can Also Create Some False Security

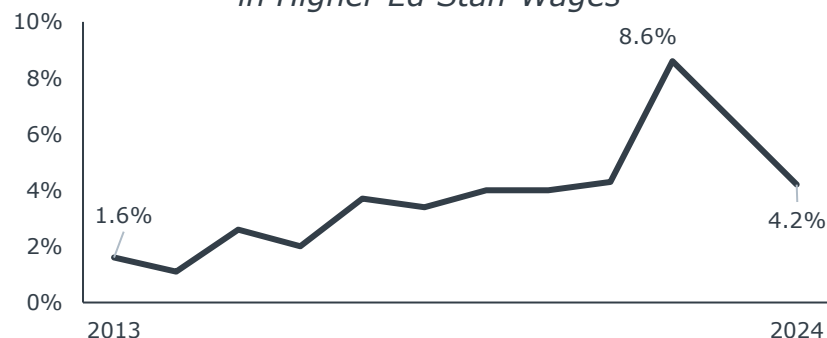
Average Yearly Increase in Higher Ed Inflation Rate¹



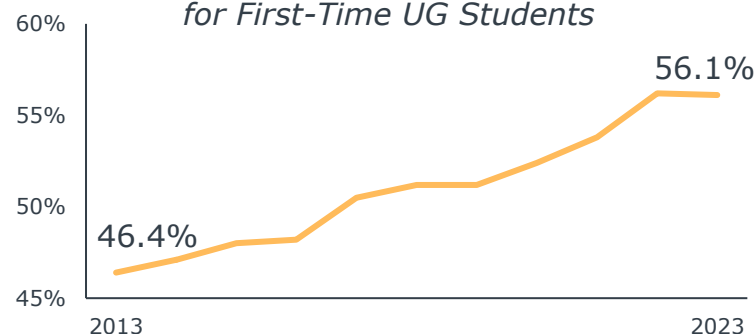
Total Asset Backlog (\$/gross square foot)



Average Yearly Increase in Higher Ed Staff Wages



Average Tuition Discount Rate for First-Time UG Students



To see EAB's latest research on cost containment, download [**Cost Containment Playbook: 130+ Tactics for Immediate Cost Savings in Higher Education**](#)

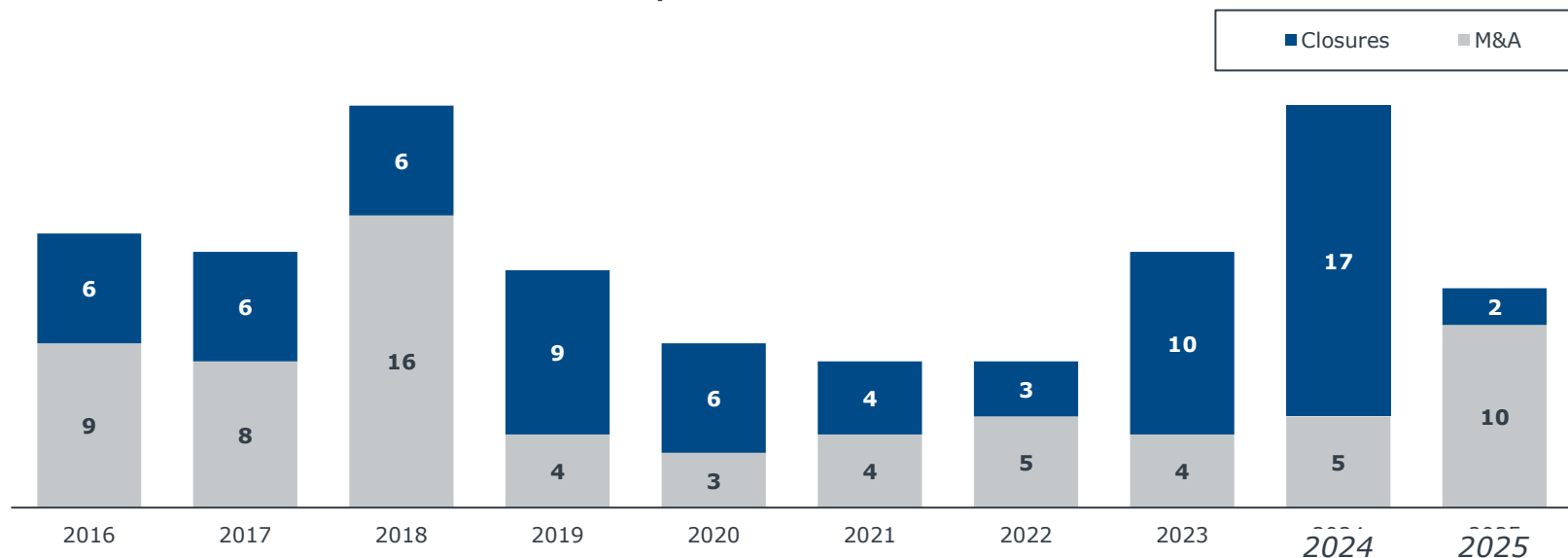


1) From the Commonfund Institute's Higher Education Price Index

Consolidation Activity by the Numbers

Fewer M&As and Closures Than Soundbites Suggest

M&A Transactions¹ and Closures, 2016-2025²



Recent Patterns in Closures and Consolidations

66%

of changes have
been closures

100%

of institutions that
closed were private

975

Average enrollment of
institutions that closed

1) M&A transactions involving public and private non-profit 4-year degree-granting institutions.

2) 2025 data represents planned transactions.

Is Improved Financial Confidence Warranted?

Percent of CBOs¹ Who Agreed With Each Statement

73%

"I am confident my institution will be financially stable over the **next 10 years.**"

85%

"I am confident my institution will be financially stable over the **next 5 years.**"

56%

"I expect my institution to be in better financial shape a year from now than it is today."

Drivers Behind Confidence



State support will increase



Institution will make budget cuts



Investment/endowment income will increase



Enrollment will increase



NTR² will increase

CBO Assessment

Low confidence

Moderate confidence

Moderate confidence

High confidence

High confidence

EAB Reality Check

Moderate confidence

Moderate confidence

Moderate/High confidence

Moderate confidence

Low/Moderate confidence

1) n=220.

2) Net tuition revenue.

A Known Playbook, But Not Fully Adopted

Potentially Better Conditions for Administrative Cost-Saving Strategies

OPPORTUNITY	WHAT WE'VE DONE	WHAT WE'VE NOT DONE	WHAT'S DIFFERENT TODAY
Centralization	Opportunistically collapsed or merged units when doing so posed low change-management risk...	...without systematically reviewing chances to consolidate and centralize work across campus	Shifts to cloud-based and hybrid work dampen largest complaints (e.g., staff proximity, access) about redesigns
Workflow	Simplified processes (e.g., removed duplicative steps) to ease workloads...	...without eliminating the paper-based processes that slow action	Forced remote work during the pandemic catalyzed widespread digitalization
Vacancy Review	Asked the right questions about whether to backfill a position...	...without mandating hold-open periods to analyze multiple vacancies together	As job-switching increases with each generation, higher number and more regular vacancies likely
Energy	Achieved visibility into the biggest energy draws...	...without replacing legacy systems with more energy-efficient technologies	Improvements in technology (e.g., solar, water) and costs make green energy ROI more achievable
Purchasing	Increased enforcement of on-contract spending and purchasing policies...	...without automating procurement processes that enhance compliance	Advances in AI, such as robotic process automation, can streamline repetitive buyer tasks like issuing purchase orders

A Known Playbook, But Not Fully Adopted

Potentially Better Conditions for Academic Cost-Saving Strategies

OPPORTUNITY	WHAT WE'VE DONE	WHAT WE'VE NOT DONE	WHAT'S DIFFERENT TODAY
Space Utilization	Deployed a range of occupancy trackers to collect utilization data...	...without creating any incentives for departments to relinquish under-utilized offices and classrooms	Remote and hybrid work have changed and often reduced use of space, creating potentially large opportunities for rationalization
Academic Program Review	Gathered data on cost, enrollment, student success, and other metrics...	...without divesting from programs that require difficult resourcing decisions	Future efforts may be able to ride in the wake of first-movers who are absorbing worst of PR pushback
Instructional Capacity	Reduced underfilled sections and excessive numbers of small courses...	...without optimizing faculty course loads or reducing overall curricular complexity	Better data today than in the past, and news of program closures likely makes faculty more willing to tackle curricular complexity
Departmental Reorganization	Aligned departmental evaluation with institutional priorities...	...without making wholesale changes to organizational designs	Expected wave of faculty retirements may enable leaders to redesign departments from ground up with fewer change management battles
Course Sharing Consortia	Partnered on some small, mostly invisible back-office services...	...without pursuing partnerships to streamline academic offerings	Increases in quality and willingness to take online courses mean physical distance, location matter less



Towards a New Business Mindset

2000s

2010s

2020s

More with More

- Launch new programs
- Target new student populations
- Expand facilities
- Embark on amenities and experience arms races
- Increase staffing
- Foster growth-mindset

More with Less

- Increase student retention and graduation rates
- Grow faculty workloads
- Improve processes
- Tighten budgets
- Upskill staff
- Encourage efficiency-mindset

Less with Less

- Narrow institutional mission
- Reject misaligned investments/opportunities
- Preserve reasonable workloads
- Contain and reduce costs
- Reward saying "no"
- Promote sustainability-mindset

Uncertain Financial Times Ahead



55% of presidents lack confidence their institution will improve financially in 2025 (vs. 2024)

20% of presidents lack confidence their institution will be financially stable over next decade

A Tale of Two Campuses



Zombie U.

Alive, Sort Of

Hiring freezes and across-the-board layoffs include mission-critical and hard-to-hire roles

Mental health and career counselors reduced by half; students lament lost services on social media

Older admin building shuttered due to rising O&M costs, forcing lease of expensive space downtown

Voluntary severance taken by strongest faculty, hollowing out popular programs

Shift to adjunct-only faculty eases hiring and firing, erodes commitment to university mission

Lurching onward, stuck in a doom loop, and increasingly appearing in *Chronicle* articles questioning its survival prospects



Rightsize State

Strategically Pruned and Thriving

3-month hold-open periods and central vacancy reviews frustrate busy staff but allow for AI, automation, and reorg solutions

Aggressive outsourcing of auxiliary tasks harms “community employer of choice” status but reduces risk, improves service

Demolishing under-filled residence halls prompts alumni uproar but offloads millions in deferred maintenance costs

Program review process narrows portfolio (and faculty headcount) while preserving mission-aligned offerings

Eliminating adjunct contracts and increasing section sizes impacts academic workload but avoids further layoffs

Fewer students, programs, space, and staff – but resilient and fiscally stronger due to choices made for long-term good

Five Priorities Shaping Higher Ed Strategy

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Public Perception of Higher Ed Value

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Artificial Intelligence

Immediate Challenge

Academic and Mental
Health Struggles Spiral
Post-COVID

Long-Term Threat

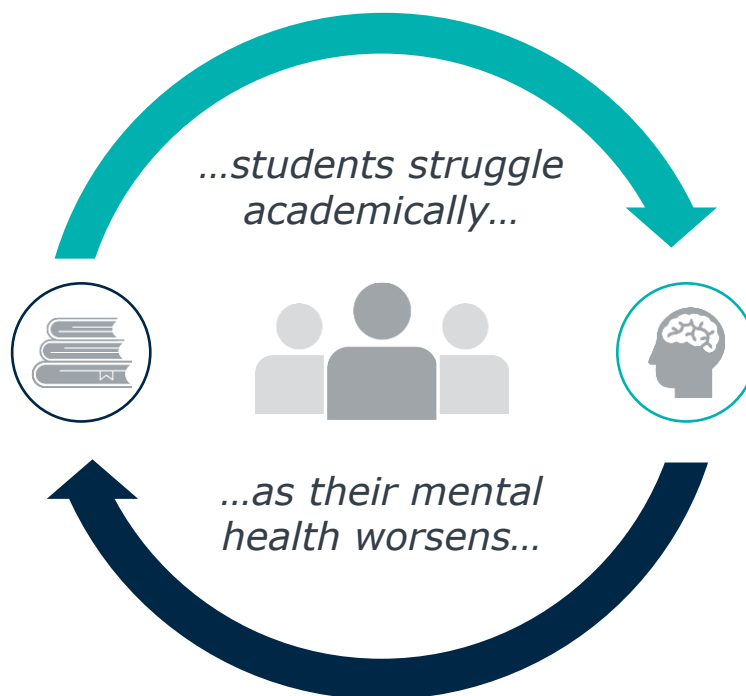
Readiness Will Continue
to Decline as Youngest
of COVID Generation
Arrive on Campus



A Vicious Cycle

Academic and Mental Health Struggles Are Mutually Reinforcing

Poor grades and falling behind on assignments **lead to feelings of stress and inadequacy**, which exacerbate mental health struggles

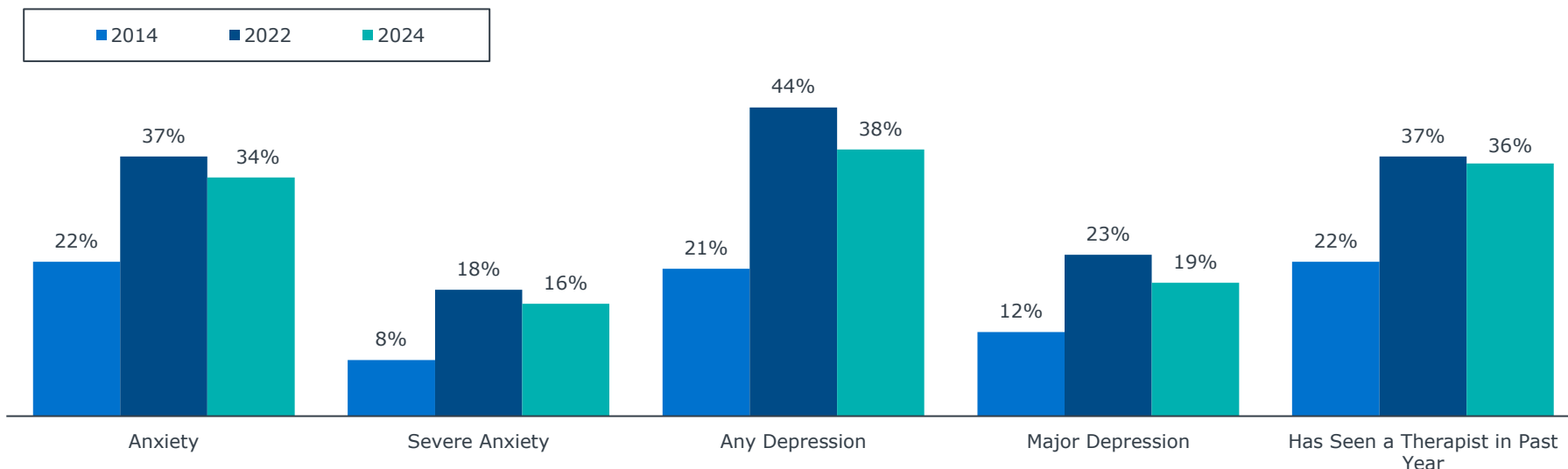


Feelings of hopelessness and anxiety cause decrease in focus and studying, which in turn **leads to poorer grades**

Mental Health Showing Some Signs of Improvement

But Anxiety and Depression Has Still Nearly Doubled Over the Last Decade

Healthy Minds Study Data Reports, 2014-2024



“

Three decades ago, the gravest public health threats to teenagers in the United States came from binge drinking, drunken driving, teenage pregnancy and smoking. These have since fallen sharply, replaced by **a new public health concern: soaring rates of mental health disorders.**

- Matt Richtel

Health and Science Reporter, *The New York Times*

1) n = 16,342 (2014 report).

2) n = 95,860 (2022 report).

3) n = 104,729 (2024 report).

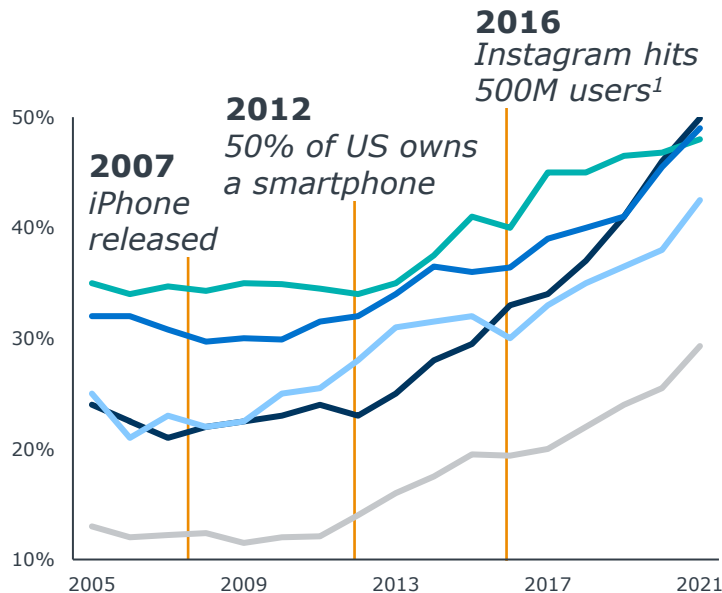
Diagnosing Drivers of the Youth Mental Health Crisis

51

The Smartphone Hypothesis vs. the Hellscape Theory

Smartphones Associated With Less Sleep, Greater Dissatisfaction With Life

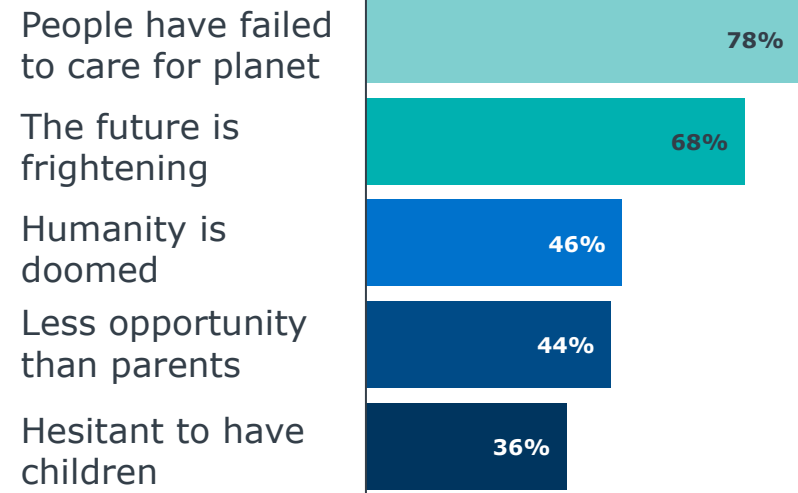
Among Students Ages 12-18



- <7hrs of sleep per night
- Agree: "Can't do anything right"
- Agree: "Don't enjoy life"
- Agree: "Often feel lonely"
- Depression rate of teenage girls (12-17)

Climate Change "Doomerism" Linked to Youth Psychological Distress

Percent of U.S. 16-25-Year-Olds That Agree



Psychological burden of climate change "apocalypse" worsened by social media algorithms amplifying content with high click rates

1) Monthly active users.

Pandemic Worsened Academic Half of Vicious Cycle

52

K-12 Unfinished Learning Has Arrived on College Campuses

Challenges That Began in High School...

2/3

of students struggled with **coursework** due to home disruptions and mental health concerns from COVID

43%

of ACT-tested 2024 HS grads met **none of the college-readiness subject benchmarks** in English, reading, science, and math¹

61%

of schools had **high or extreme levels of chronic absence**, compared with only 28% pre-pandemic

...Are Now on Campus



Chronic absenteeism² continues to grow on college campuses



Academic struggles lead to **higher DFW³ rates** in introductory courses



Institutions report incoming students struggle with **gaps in core knowledge** and **poor study habits**



Widening expectation gaps between faculty and students on work expected outside the classroom

1) Doubled from 26% in 2019.

2) Defined as missing 10% or more of the academic year.

3) D grade, F grade, or withdrawal.

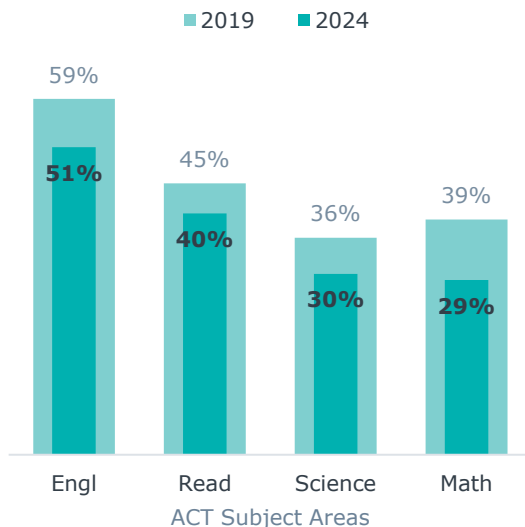
It Will Get Worse Before It Gets Better

Gaps from Unfinished K-12 Learning Will Be Felt for Years To Come

Pre- and Post-COVID Math Readiness by Age Cohort

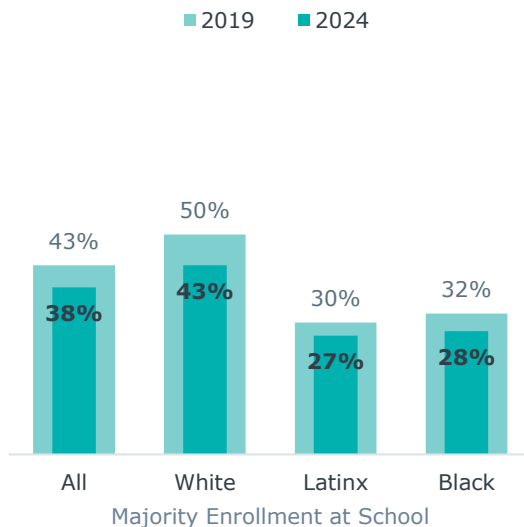
Current College First Years

ACT College Readiness Among 2023 HS Grads



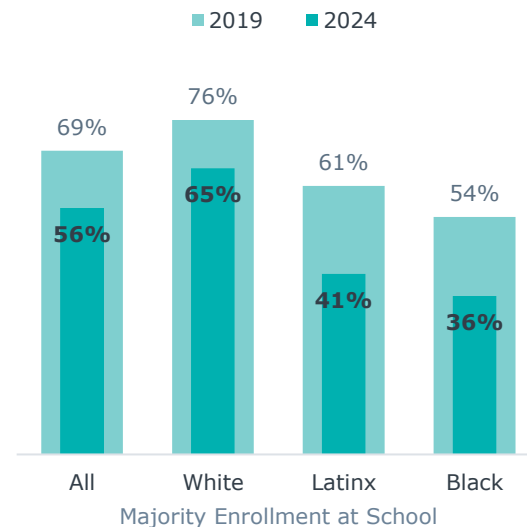
Current Ninth Graders

On Pace for College Math in 8th Grade (i-Ready¹)



Current Fifth Graders

On Pace for College Math in 4th Grade (i-Ready¹)



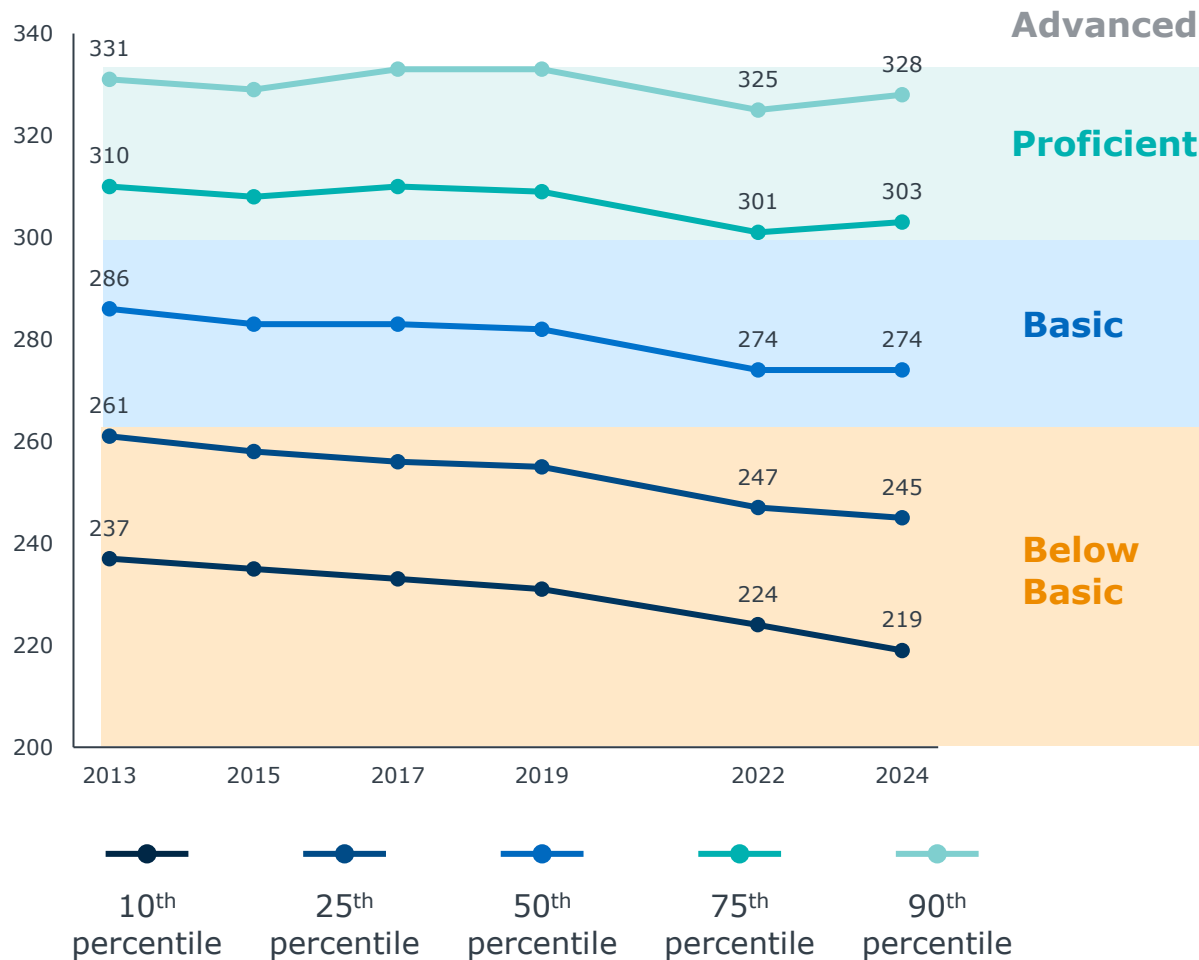
1) *i-Ready Diagnostic* is an assessment designed to monitor student knowledge over a period of time.

Latest Data Not Showing Many Encouraging Signs



Students Who Struggle Most Continue to Lose Ground

Trend in 8th grade NAEP¹ Math Scores at Five Selected Percentiles



Average Reading Scores Have Dropped 5 Points Post-COVID

8th Grade Average Score

263 → **258**
in 2019 in 2024

4th Grade Average Score

220 → **215**
in 2019 in 2024

1) National Assessment of Educational Progress.

Getting Ahead of Rising Academic Struggles

Strategic Investments To Make Now To Support Future Cohorts

CURRENT STATE

FUTURE STATE

Math and English placement testing

Many students who could have taken college-level courses are placed in remedial education, pushing back time to degree

Noncredit remedial courses

Extra courses for no credit cost students time and tuition dollars, as well as slow academic momentum

College algebra and calculus sequence

Traditional math instruction in college algebra or calculus can feel too difficult and disconnected from daily lives of most students

Reactive tutoring

More tutoring staff and centers likely needed, but work must also be done to increase participation in these services before critical success junctures

Multiple measures assessments

More accurate math and English placement results in fewer students in remedial education and overall higher student success rates

Supplemental/corequisite instruction

Taken in parallel to gateway courses, corequisite courses provide “just in time” support, resulting in higher pass rates and retention

Statistics and other sequences

Realign math requirements with major coursework expectations (e.g., math for liberal arts, statistics, data science sequences)

Proactive academic support

Internal resource awareness campaigns and effective early alert systems that connect students with supports improve utilization and effectiveness

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Immediate Challenge

Select Policies and Training
Necessary to Navigate
AI Transition

Long-Term Threat

AI-Infused Curriculum
Required to Prepare
Students for Future of Work



Defining Our Terms



Artificial Intelligence (AI):

Machines that can reason and solve problems in human-like ways, mimicking capabilities such as communication and pattern recognition

AI Was Already in Our Everyday Lives Before ChatGPT...



Siri uses natural language processing (NLP) and deep learning to understand and respond to voice commands



Waze uses AI to analyze real-time traffic data and optimize route recommendations

Uber

Uber uses machine learning, deep learning, and NLP in both internal and external functions



TikTok uses machine learning algorithm, personalizing content feeds based on user interactions

Generative AI (GenAI):

AI that can predict or "generate" the next word, pixel, etc. in a sequence, creating the capacity to "make" new content

...But New AI Tools Unlock Human-Like Outputs



AudioCraft (Meta)
Type: Audio



GitHub Copilot (Microsoft)
Type: Code



Runway ML
Type: Video Creator and Editor



Midjourney
Type: Images



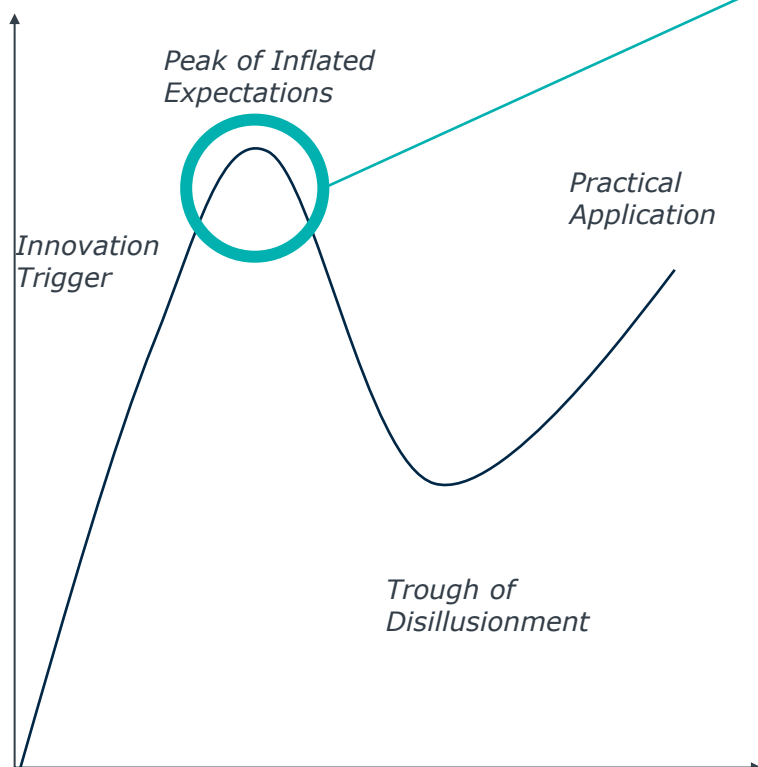
ChatGPT (OpenAI)
Type: Text and images
By Jan 2023, ChatGPT reached 100M users in just two months, the fastest-growing app in history (at the time)

Have We Reached the Peak of Inflated Expectations?

59

Waiting Out the Hype Cycle Protects Against Premature Investments

Traditional Hype Cycle

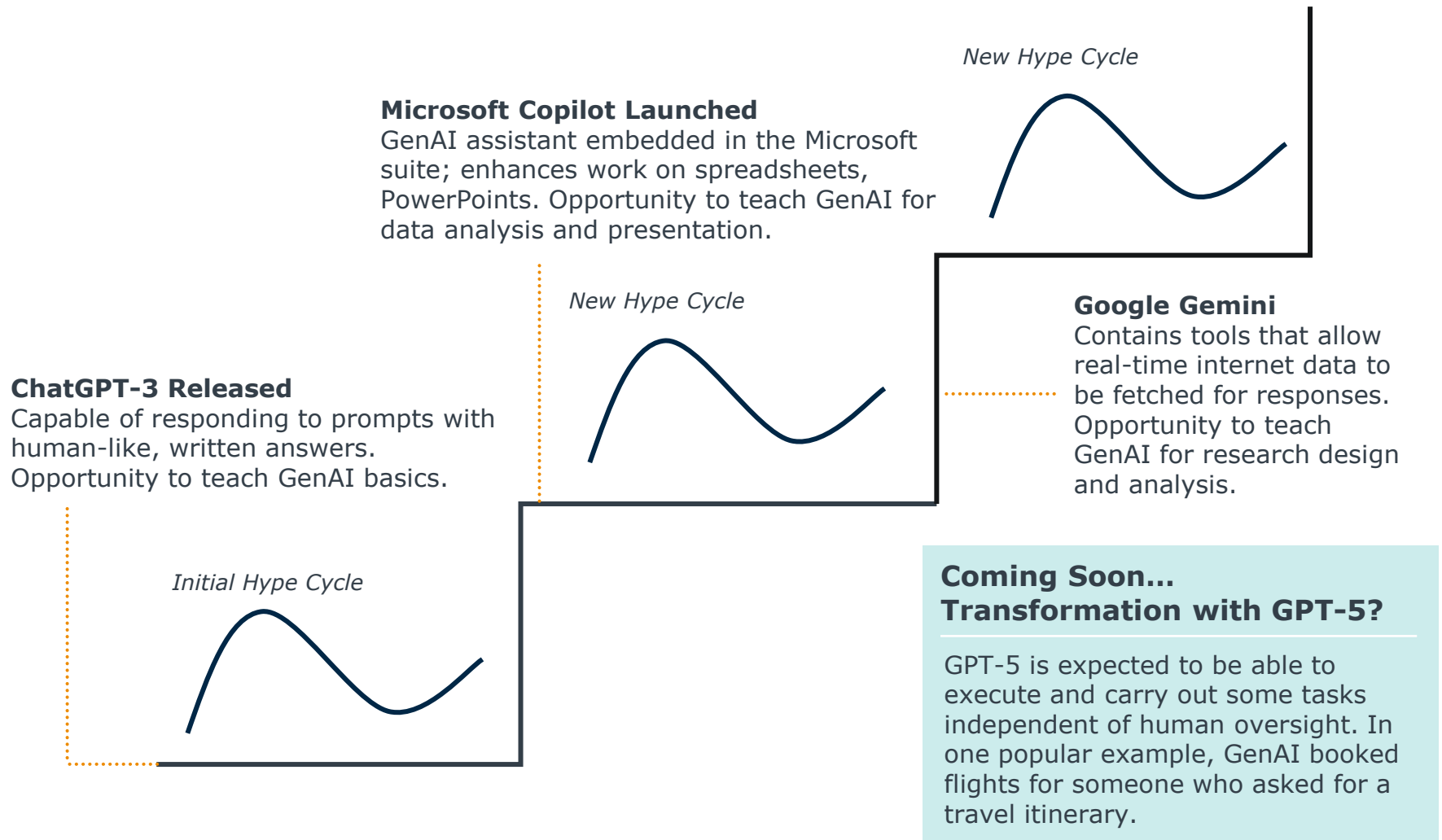


Overheard in Our 100+ Research Interviews on GenAI

- ▶ “My hunch is that it will be **a year until we see the skills that are actually integral for GenAI.**”
-Dean, R1 Institution
- ▶ “We had a **lot of momentum out the gate.** We created new policies and encouraged faculty and staff to experiment. I think that was effective. **But I’m not sure where my institution is going next.**”
-CIO, Liberal Arts College
- ▶ “I think we are all kind of **waiting until some of it gets figured out** and then we will decide what to do.”
-VP, Regional Public

You Haven't Missed the Boat on AI

GenAI Brings New Hype Cycle With Each Update to Technology



AI's Potential To Support Key Goals in HE Sector



Increase Financial Sustainability

I.e., Reduce Costs

*Long-Term Vision:
Scaled Productivity Gains*

Deploy AI applications across the enterprise at a scale that eliminates low-value activities, enables a greater output of work, and ultimately reduces operating costs.

*More Immediate Vision:
Individual or Team-Based Productivity Gains*

Pinpoint areas where AI enables greater individual or team efficiency, laying groundwork for wider adoption.

**Boosting Administrative
Efficiency with AI**

Increase Competitiveness

I.e., Grow Revenue

*Long-Term Vision:
Building an AI University*

Faculty embrace AI and incorporate it into curriculum and research applications; prospective students seek out the institution as desired destination to prepare for an AI future.

*More Immediate Vision:
Enhancing Faculty (and Student) AI Literacy*

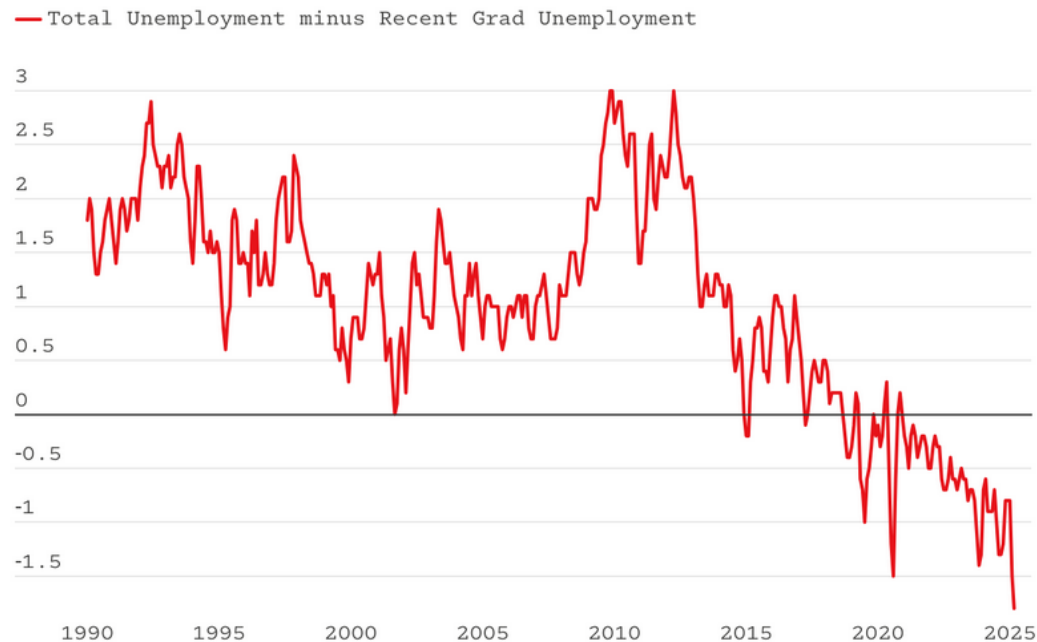
Enable small-scale experimentation with AI as pedagogical tool as well as force transforming curriculum.

**Engaging the
Faculty with AI**

SOMETHING ALARMING IS HAPPENING TO THE JOB MARKET

A new sign that AI is competing with college grads

The New Grad Gap



Source: U.S. Census Bureau and U.S. Bureau of Labor Statistics, Current Population Survey (IPUMS).

Source: [The Atlantic](#), 2025.

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The Urgency vs. Importance Challenge

Crisis Management Crowds Out Strategic Thinking Time

Delayed Fall Start

*Simultaneous Online
and F2F Instruction*

*Modularized
"Mini-Mesters"*

*Full Return To On-
Campus Operations*

*Postpone Fall
Semester To
Spring*

*Low-Residency
Model*

*Early Summer
Start With Mid-
Fall Closure*

*100% Remote
Instruction*

*Only Core and
Lab Courses F2F*

“

“Our executive team is managing the crisis day-to-day – hundreds of operational decisions. We’re frankly exhausted. **But what worries me most is that the urgent is crowding out time for strategy – are we prioritizing the right things?** How do we survive at the end of this, or not end up being a shell of our former self.”

President

Large Research University

”

*Some Courses
F2F, Some
Online*

*Separate
People by Age*

*Students on
Campus, Faculty
Remote*

*Staggered Fall
Starts*

*Only Grad
Students Return*

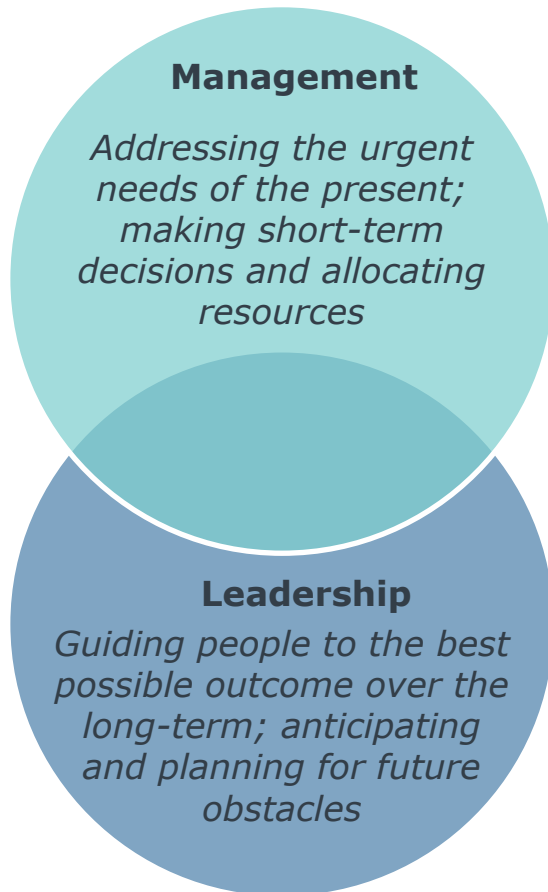
*Only First-year
Students Return*

*Students Live in
Dorms, Learn Online*

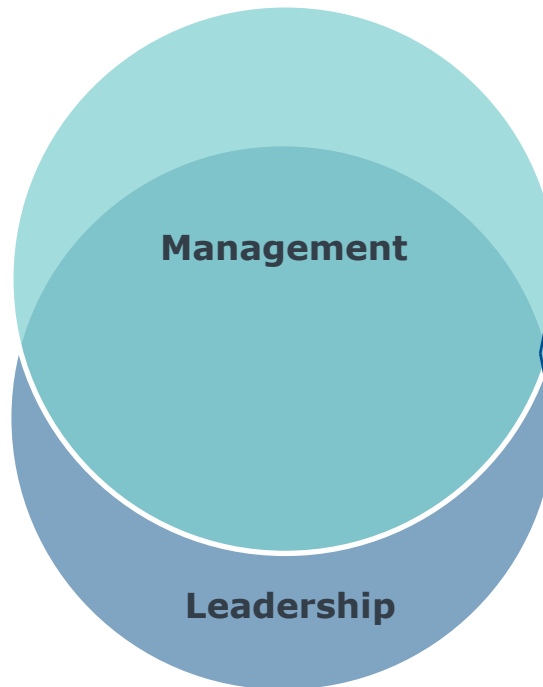
Management Creep During Crisis

Crises Make Managers Out of Leaders, at the Expense of Strategic Growth

Optimal Division of Presidential Mindshare



Presidential Mindshare During a Crisis



Contributions to Crisis Management Creep



Stakeholder anxiety



No "playbook" to reference



Irrelevant urgency

Why Higher Ed Culture Eats Strategy

Mission-, Culture-Driven Ethos Often a Double-Edged Sword

Worthy Efforts to Build Consensus Frequently Prevent Strategic Thinking



"Everyone deserves a seat at the table"

Participation in planning seen as necessary to further individual or departmental agendas



"Every idea is a good idea"

Culture of inclusion fosters belief that every contribution has equal merit



"We've got to all be on board"

Complete consensus viewed as the only way to move ideas beyond committee meetings



- ✗ Prohibitively long planning process
- ✗ Few in-depth discussions
- ✗ Conversations dominated by a few, loud voices



- ✗ "Wish list" plan
- ✗ Few trade-offs
- ✗ Little consideration of actionability or scale



- ✗ Bold ideas are rejected outright
- ✗ End goals are vague, watered down
- ✗ Potential disruptors prevented from participating

Wearing Many Hats

How to Achieve Diversity of Perspectives in Small, Efficient Teams



Apply Psychological Principles at Your Next Meeting

Role Play: Assign roles to your team to ensure that a variety of interests are represented in strategic conversations

Potential Role Frameworks:

- ☒ Institutional Divisions
- ☒ Functional Archetypes
- ☒ "Thinking Hats"
 - Developed by psychologist Edward de Bono in the '80s
 - Logic not necessarily step-by-step—multiple modes of thinking necessary
 - Way to get beyond immediate reactions and prevent one type of thinking from dominating

Thinking Hats Framework



Perspective

- Focus on data
- Analyze trends
- Identify gaps

Typical Questions

- What data do we have?
- What is the evidence?
- Is that a fact or a belief?



- Focus on emotion
- Provide skeptics' gut reaction

- What is your gut reaction?
- How do we think people will react?



- Focus on weaknesses
- Be critical

- What is the downside?
- Does this conclusion make sense?



- Focus on strengths
- Be optimistic

- What is the best-case?
- What are the benefits?
- What is the best next step?



- Focus on creativity
- Brainstorm out-of-the-box solutions

- What are all the possible alternatives?
- Is there any way we can use this idea?



- Focus on steering the meeting
- Direct conversation

- What is the objective?
- Are we getting anywhere in this conversation?

The Secret to Googlers' Effectiveness



We learned that there are five key dynamics that set successful teams apart from other teams at Google. . . .

Psychological safety was far and away the most important.”

Julia Rozovsky
People Analytics Manager

Practices that Foster Psychological Safety



FOSTER AN ENVIRONMENT THAT...

Sets Clear Expectations

LEADERSHIP PRACTICES:

Frame the Work: set expectations about failure, uncertainty, and interdependence to clarify the need for voice

Emphasize Purpose: identify what's at stake, why it matters, and for whom

Welcomes all Voices

LEADERSHIP PRACTICES:

Demonstrate Situational Humility: Acknowledge Gaps

Practice Inquiry: Ask good questions and model intense listening

Be Open to Many "Ways": create forums for input, and approaches for multiple ways of reaching outcomes

Has a Learning Mindset

LEADERSHIP PRACTICES:

Express Appreciation: Listen, acknowledge, thank

Destigmatize Mistakes and Failures: Look forward, offer help, discuss/consider/brainstorm next steps

Closing Reflection



	Strongly Disagree	Disagree	Tend to Disagree	Tend to Agree	Agree	Strongly Agree
1. If you make a mistake, it is often held against you						
2. People sometimes reject others for being different						
3. It is difficult to ask other members for help	Psychologically Safe					
4. There is a model “way” I need to do things in order to be successful						
5. People are viewed as an insider or an outsider						
6. Members can bring up problems and tough issues						
7. It is safe to take a risk				Psychologically Safe		
8. No one would deliberately act in a way that undermines my efforts.						
9. My unique skills and talents are valued and utilized.						

Thought Exercise: If you gave this to your team, how would they respond?



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